

EDUCATION WORKLOAD METRICS - GUIDELINES

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1. EDUCATION ACTIVITIES IN THE WORKLOAD

Within Education, academic staff undertake a wide range of activities. According to the UQ PPL (<https://ppl.app.uq.edu.au/content/5.41.07-workload-allocation-academic-staff>), these activities include, but are not restricted to:

- *Preparation and delivery of lectures*
- *Preparation and conduct of tutorials*
- *Preparation and supervision of practical classes*
- *Course coordination*
- *Clinical teaching and supervision*
- *Supervision of honours and research students*
- *Marking of examinations and assignments*
- *Compilation and submission of examination results*
- *Student consultation (during semester and pre- and post-examinations)*
- *Preparation and delivery of material in flexible mode*
- *Teaching in summer sessions (which may involve any of the above activities)*
- *Teaching in weekend seminars or inter-semester periods*
- *Teaching in intensive mode (e.g. one week professional education courses)*
- *Cross-campus teaching*
- *Off-shore teaching*

The SoE Education Workload Metric will measure the following variables:

1. Contact Hours in Traditional and Blended Learning Approaches to Teaching (not including tutorials)
2. Teaching Preparation, with an allowance for innovation and special consideration for
 - First Time Preparation
 - First Time Preparation for Flexible Mode (in UQ2U involved courses)

3. Consultation and Communications, with special consideration for
 - Enrolment Size
 - Admin/Tutor Support
4. Development of Assessment and Marking, with special consideration for
 - First Time Preparation
 - Enrolment Size
 - Admin/Tutor Support
 - Co-badged Courses
5. Course Coordination, with special consideration for
 - Enrolment Size
 - Admin/Tutor Support
 - Co-badged Courses
6. Tutorial Coordination, with special consideration for
 - First Time Preparation
 - Enrolment Size
 - Admin/Tutor Support
7. Tutorial Preparation and Delivery
8. Dissertation Supervision and Marking

2. MEASURING EDUCATIONAL ACTIVITIES

This Section describes the measurement of each of the above educational activities.

1. Contact Hours in Traditional and Blended Learning Approaches to Teaching (all forms except tutorial)

This is calculated as the number of original and repeat contact hours per week multiplied by the number of weeks the course is planned to be delivered by that academic staff. An original (repeat) lecture is the first (subsequent) lecture within the last 7 days by a lecturer. Throughout this document, the term lecture is used to refer to both traditional and blended learning approaches to teaching, such as workshops and seminars, but does not include tutorials.

2. Teaching Preparation

The standard preparation time for an established course delivery of an **original** lecture is **2 hours per 1 contact hour** and for a **repeat** lecture is **1 hour per 1 contact hour**. This preparation time is expected to be dedicated but not restricted to review lecture slides/notes, upload those and associated material to the course BB site. An allowance for **basic innovation** of lecture material will be given to update teaching materials at the rate of **2 hour per 1 original contact hour**.

Preparation time will be given special consideration for

- **First Time Preparation:** with additional **2 hours per original contact hour**, i.e. a total of 5 hours per 1 original contact hour. First time Preparation means that this course has not been taught by the academic staff member in the last 2 years.
- **First Time Preparation for Flexible Mode** (for UQ2U courses): with additional time as **first time preparation** (in all teaching activities including assessment and tutorial coordination) and additional hours (**up to 4 hours**) **per original contact hour**, i.e. a total of up to 9 hours per 1 original contact hour.

For a standard course with no repeats or special considerations, this means 39 hours.

Note that Level B academic staff (under probation) receive an education allowance in the first year of appointment. With this arrangement, and similar to the preceding Principles and Guidelines for the Allocation of Academic Workloads in SoE, support is provided to early career academics in their development of an education and research and/or scholarship of teaching portfolios within their probationary period.

3. Consultation and Communications

Consultations and communications with students will be expected as **1 hour per 1 original contact hour**, with the understanding that some of those consultations and communications (E) will be before, during and after the semester. For a standard course with 2-contact hours over 13 weeks, this means 26 hours. Time dedicated to these activities will be dependent on enrolment size (indicated above with an E).

Consultations and Communications will be given special consideration for

- **Enrolment size:** with additional time per Number of Student Enrolled (NSE), as implied by this **E-Hours calculator**:

$$\text{MAX}(\text{MIN}(0.1350 * \text{NSE}, 35), 0).$$

That is 0.1350 of an hour per student up to 35 hours for the entirety of the course. When a course is co-taught, these hours will be split among the different co-lecturers weighted by the share of their teaching.

- **Tutor/Admin Support:** with less additional time per NSE than without support. This feature is captured by replacing the above E-hours calculator by a **modified E-Hours calculator**:

$$\text{MAX}(\text{MIN}(0.3333 * 0.1350 * \text{NSE}, 35), 0).$$

That is 0.0450 of an hour per student up to 35 hours for the entirety of the course. When co-taught, same caveat as above applies.

4. Development of Assessment and Marking

The activities within preparation of assessment include but are not restricted to the timely development, revisions and final submission of all forms of assessment, development of sample assessment and marking guides for the course, and to be contactable during exams and the assistance in the review process of other examinations for other courses within the School. The activities within marking of assessment include the timely marking of all forms of assessment for the course.

A standard preparation of assessment will be expected to take up to **2 hours per 1 original contact hour**. For a standard course with 2-contact hours over 13 weeks, this means 52 hours. A standard marking of **1 student** over all forms of assessment in a standard course will be expected to take up to **1 hour**. For quality assurance, it is expected that, for a given course, a lecturer would mark all assessment of a minimum of 15 students or number of students enrolled, if below 15, and that the same lecturer would mark all assessment of 75 students spread over the courses the lecturer is involved.

Preparation of Assessment will be given special consideration for

- **First Time Preparation:** with additional **1 hour per 1 original contact hour**, i.e. a total of 3 hours per 1 original contact hour for development of assessment.
- **Co-Badged Courses:** with an additional **0.250 hours per 1 original contact hour**. When courses are co-badged (multiple coded courses taught within the same lecture delivery), assessment is required to be different across the different codes.

Marking of assessment is given special consideration for

- **Enrolment Size:** when the number of enrolled students (in all courses involved) falls below 75 students, the normal expectation is that the lecturer would mark all assessment for all students with a workload in marking of 1 hour per student per course. Note that a default requirement for academic staff is to teach a minimum of 75 students per year.
- **Tutor/Admin Support:** when the number of enrolled students is above 75 students (in all courses involved), the normal expectation is that tutors may assist in the marking of assessment of any student beyond the initial 75.

5. Course Coordination

The activities within course coordination include, but are not restricted to, the timely preparation and submission of ECP; communication with the bookshop and publishers; liaise with admin support for timetable finalisation and room bookings (A); development and publication of the BB site; coordinate the overall delivery of lectures and tutorials (E,T/A); compilation and submission of assignment and exam marks (A,E); compilation and submission of exam papers; grade finalisation and associated paper work submission (E); arrange student feedback sessions (A,E); be initial contact for both student and admin enquires regarding the course (A,E); address feedback forms and assist with re-marks for this or other courses within the School (as appropriate) (E); and take overall responsibility for the administration and delivery of the course (E,A/T).

With very low enrolments, course coordination is expected to take up to **1 hours per 1 original contact hour**. For a standard course with 2-contact hours over 13 weeks, this means 26 hours. Time dedicated to some of these activities will be dependent on

enrolment size (indicated above with an E) and on the provision of admin/tutor support (indicated above with an A and/or T).

Course coordination will be given special consideration for

- **Enrolment size:** with additional time per Number of Student Enrolled (NSE), as implied by this **E-Hours calculator:**

$$\text{MAX}(\text{MIN}(0.1350 * \text{NSE}, 35), 0).$$

That is 0.1350 of an hour per student up to 35 hours for the entirety of the course.

- **Co-Badged Courses:** with an additional **0.250 hours per 1 original contact hour**. When courses are co-badged (multiple-coded) as ECP and grade finalisation must be different across the different codes.
- **Tutor/Admin Support:** with less additional time per NSE than without support. This feature is captured by replacing the above E-hours calculator by a **modified E-Hours calculator:**

$$\text{MAX}(\text{MIN}(0.3333 * 0.1350 * \text{NSE}, 35), 0).$$

That is 0.0450 of an hour per student up to 35 hours for the entirety of the course.

6. Tutorial Coordination

Tutorial Coordinators are expected to prepare all tutorial questions and associated solution guide; upload tutorial material to the course BB site; distribute tutorial questions, solutions and associated material to tutors (E); coordinate the overall delivery of tutorials (E,T/A); compile marks for tutorial assessment items (T/A); prepare tutor consultation rosters if needed (T/A); and monitor the BB discussion board (T/A).

A standard tutorial coordination will be expected to take up to **1 hour per 1 original tutorial hour**. For a standard course with 1-tutorial hours over 12 weeks, this means 12 hours.

Tutorial and Pass Coordination is given special consideration for

- **First Time Preparation:** with additional **1 hour** per 1 original tutorial contact hour, i.e. a total of **2 hours** per 1 original tutorial hour for tutorial preparation.

- **Enrolment size:** with additional time per Number of Student Enrolled (NSE), as implied by this **E-Hours calculator**:

$$\text{MAX}(\text{MIN}(0.0625 * \text{NSE}, 16.25), 0).$$

That is 0.0625 of an hour per student up to 16.5 hours for the entirety of the course.

- **Tutor/Admin Support:** with less additional time per NSE than without support. This feature is captured by replacing the above E-hours calculator by a **modified E-Hours calculator**:

$$\text{MAX}(\text{MIN}(0.3333 * 0.0625 * \text{NSE}, 16.25), 0).$$

That is 0.0208 of an hour per student up to 16.25 hours for the entirety of the course.

7. Tutorial Preparation and Delivery

Tutorial contact hours are calculated in a similar fashion to lecture contact hours. The standard associated work time for an established tutorial delivery of an **original** tutorial is **2 hours per 1 tutorial contact hour** and for a **repeat** tutorial is **1 hour per 1 tutorial contact hour**. This associated work time is expected to be dedicated but not restricted to review the tutorial solutions and provide additional consults to students.

For a standard course with a 1 hour original tutorial (with no repeats) per 2 original lecture contact hours, this means 26 hours.

8. Dissertation Supervision and Marking

Supervision of PhD, Honours and Masters students and marking of dissertations of UQ students in a given year will be counted towards the next year's allocation (i.e. on completion of a year of supervision and on completion of marking). Where provisional supervisory teams are appointed for the 1st year of the PhD, PhD student supervision will not count towards the provisional supervisors' workload (but will count towards good citizenship in the service allocation). Otherwise, supervision in the 1st year of the PhD will have half weight to reflect the fact that student will normally spend a significant proportion of their time on coursework.

Full responsibility of supervision of 1 PhD or 1 Honours or 1 Masters student is expected to take up to 0.75 hours per week of supervision.¹ Over a year, this would imply 48 weeks for a PhD student (other than for the 1st year), and 24 or 48 weeks for Masters and Honours depending on whether the enrolling course runs for one or two semesters.

Supervision of a PhD/Honours/Master student for academic staff will be calculated in full-time equivalent (FTE) hours. Thus, it will be counted as the number of PhD/Honours/Masters Students allocated to the staff member multiplied by the share of supervision responsibility, by 0.75 hours per week and by the number of weeks. The weights on supervision may require adjustment when group supervision of Honours and/or Master Students takes places.

The expectation is that dissertation supervision that counts towards education activities should take no more than 172.5 hours per year (i.e. a block). For dissertation supervision above 1 block, the understanding is that such supervision provides research benefits.

Marking of Honours and Master Theses of UQ Students will be expected to take up to **8 hours per thesis**.

3. THE EDUCATION WORKLOAD METRIC VARIABLES BY GROUPS

In Section 2, the SoE Education Workload Metric is explained from the perspective of the different individual education activities to measure. Putting supervision and theses marking aside, another perspective is to consider activities that (i) only depend on the number of contact hours; (ii) also depend on enrolment size and tutor/admin support; and (iii) are affected by special circumstances (such as first-time preparation or co-badged courses).

1. Dependent on Number of Contact Hours

- Lecture and Tutorial Contact Hours: are given by $CH = CHL + CHRL + CHT + CHRT$, with

$$CHL = [(\# \text{ of Lectures}) \times (\# \text{ of Hours}) \times (\# \text{ of Weeks})],$$

¹ Supervision may take more time than 0.75 hours per week per full-time equivalent student. The understanding is that some of the time dedicated to these activities has also research benefits and therefore count towards the research allocation. Then, 0.75 hours per week is the supervision time net of research benefits.

$$\text{CHRL} = [(\# \text{ of Repeat Lectures}) \times (\# \text{ of Hours}) \times (\# \text{ of Weeks})],$$

$$\text{CHT} = [(\# \text{ of Tutorials}) \times (\# \text{ of Hours}) \times (\# \text{ of Weeks})],$$

$$\text{CHRT} = [(\# \text{ of Repeated Tutorials}) \times (\# \text{ of Hours}) \times (\# \text{ of Weeks})].$$

- Prep hours: calculated as

$$\text{PrepH} = [(2+1) \text{ Hours} \times \text{CHL}] + (1 \text{ Hour} \times \text{CHR}) + (1 \text{ Hour} \times \text{CHT}) + (0 \text{ Hour} \times \text{CHRT}).$$

- Consultation and Communications: calculated as

$$\text{Cons} = (1 \text{ Hour} \times \text{CHL}) + (1 \text{ Hour} \times \text{CHT}) + (1 \text{ Hour} \times \text{CHRT}).$$

- Assessment: calculated as

$$\text{Asse} = (2 \text{ Hours} \times \text{CHL}).$$

- Course Coordination: calculated as

$$\text{CC} = (1 \text{ Hour} \times \text{CHL}).$$

- Tutorial Coordination: calculated as

$$\text{TC} = (1 \text{ Hour} \times \text{CHT}).$$

- Summing up, the education workload metric that is only a function of contact hours adds up to

$$\text{SubTotalCH} = \text{CHRT} + \text{PrepH} + \text{Cons} + \text{Asse} + \text{CC} + \text{TC},$$

which equals

$$\text{SubTotalCH} = (8 \text{ Hours} \times \text{CHL}) + (2 \text{ Hours} \times \text{CHR}) + (4 \text{ Hours} \times \text{CHT}) + (2 \text{ Hours} \times \text{CHRT}).$$

2. Dependent on Enrolment Size and Admin/Tutor Support

- There are a number of education activities whose load in terms of required hours increase with the Number of Student Enrolled (NSE) in a given course and that these are affected by the presence of admin/tutor support.

- **Consultation and Communications** hours, with no admin/tutor support, are calculated as

$$\text{MAX}(\text{MIN}(0.1350 * \text{NSE}, 35), 0) \text{ hours};$$

and, with admin/tutor support, as

$$\text{MAX}(\text{MIN}(0.3333 * 0.1350 * \text{NSE}, 35), 0) \text{ hours.}$$

- **Course Coordination** hours, with no admin/tutor support, are calculated as

$$\text{MAX}(\text{MIN}(0.1350 * \text{NSE}, 35), 0) \text{ hours.}$$

and, with admin/tutor support, as

$$\text{MAX}(\text{MIN}(0.3333 * 0.1350 * \text{NSE}, 35), 0) \text{ hours.}$$

- **Tutor Coordination** hours, with no admin/tutor support, are calculated as

$$\text{MAX}(\text{MIN}(0.0625 * \text{NSE}, 16.25), 0) \text{ hours.}$$

and, with admin/tutor support, as

$$\text{MAX}(\text{MIN}(0.3333 * 0.0625 * \text{NSE}, 16.25), 0) \text{ hours.}$$

- Summing up, for a given course with no admin/tutor support, the educational activities (except for marking) that depend on enrolled student numbers in a given standard course for the entirety of that course are calculated as

$$\text{SubTotalSNE} = \text{MAX}(\text{MIN}(0.3325 * \text{NSE}, 86.25), 0).$$

With admin/tutor support, the above is replaced by

$$\text{SubTotalSNE} = \text{MAX}(\text{MIN}(0.3333 * 0.3325 * \text{NSE}, 86.25), 0).$$

- **Marking:** for a given workload education, marking is calculated as

$$\text{Marking} = \text{Min}(\text{Sum of all NSE}, 75) \text{ hours.}$$

3. Dependent on Special Circumstances

- **First time preparation**, which increases preparation time and assessment development time respectively by

$$\text{PrepH-FirstTime} = (2 \text{ Hours} \times \text{CHL});$$

$$\text{Asse-FirstTime} = (1 \text{ Hour} \times \text{CHL});$$

$$\text{TC-FirstTime} = (1 \text{ Hour} \times \text{CHT}).$$

Summing up, the additional time of a first time preparation is

$$\text{FirstTimeAdjustment} = (3 \text{ Hour} \times \text{CHL}) + (1 \text{ Hour} \times \text{CHT}).$$

- **First time preparation in flexible mode (UQ2U)**, increases preparation time and assessment development time respectively by

$$\text{PrepH-FirstTimeUQ2U} = (\text{up to } 4 \text{ Hours} \times \text{CHL}) + \text{FirstTimeAdjustment}$$

- **Co-Badging Courses** increases course coordination and assessment development time respectively by

$$\text{Co-Badged_CC} = (\# \text{ of Co-Badged Course Codes} - 1) \times (0.250 \times \text{CHL})$$

$$\text{Co-Badged_ASSE} = (\# \text{ of Co-Badged Course Codes} - 1) \times (0.250 \times \text{CHL})$$

This implies an allowance of Co-Badged = Co-Badged_CC + Co-Badged_ASSE, or

$$\text{Co-Badged} = (\# \text{ of Co-Badged Course Codes} - 1) \times (0.500 \times \text{CHL})$$

- Summing up, adjustment to education loads for special circumstances within a course are calculated as

$$\text{SpecialC} = (\text{FirstTimeAdjustment}) \text{ or } (\text{PrepH-FirstTimeUQ2U}) + (\text{Co-Badged})$$

4. Dissertation Supervision and Marking

- Dissertation supervision is calculated as

$$\text{DissSupPhD} = I \times (\# \text{ of PhD Students}) \times (\% \text{ Responsibility}) \times (\# \text{ of Weeks}) \times 0.75 \text{ hours}$$

where $I=0.5$ if the PhD student is in the first year of the PhD and otherwise 1.

$\text{DissSupHonEcon} = (\# \text{ of HonEcon Students}) \times (\% \text{ Responsibility}) \times (\# \text{ of Weeks}) \times 0.75 \text{ hours}$

$\text{DissSupHonOther} = (\# \text{ of HonEconOther Students}) \times (\% \text{ Responsibility}) \times (\# \text{ of Weeks}) \times 0.75$
hours

$\text{DissSupMaster} = (\# \text{ of Master Students}) \times (\% \text{ Responsibility}) \times (\# \text{ of Weeks}) \times 0.75 \text{ hours}$

$\text{DissSup} = (\text{DissSupPhD} + \text{DissSupHonEcon} + \text{DissSupHonOther} + \text{DissSupMaster})$

- Dissertation Marking is calculated as

$\text{DissMarking} = (\# \text{ of theses marked}) \times 8 \text{ hours}$

- Summing up, dissertation supervision and marking is calculated as

$\text{Diss} = \text{MIN}(\text{DissSup}, 1 \text{ block}) + \text{DissMarking}$

Summing up, the education workload of an academic can be computed as

$\text{EduWorkload} = \text{Sum of all SubTotalCH} + \text{Sum of all SubTotalSNE} + \text{Marking}$
 $+ \text{Sum of all SpecialC} + \text{Diss}$

4. OTHER OPERATIONAL MATTERS

- Consideration of special circumstances beyond those recognised in the above metrics will be minimal and would require Head of School approval.
- Whenever possible and requested, T&R academic staff will be given the opportunity to deliver the education activities (not including short-notice teaching opportunities and dissertation supervision and marking) within one regular semester.
- Unless agreed, academic staff will not normally be required to teach in more than two consecutive semesters out of three (Semester 1, Semester 2, Summer) in the year.
- Whenever possible and requested, and subject to performance, staff will be given

the opportunity to continue delivering the same course for at least three consecutive teaching years.

- Courses will normally only be split/shared if there are academic reasons for doing so.

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SUMMARY TABLE OF WEIGHTS

EDUCATION ACTIVITY	Weight	Scale
Preparation per Contact Hour of Original Lecture (CHL)	2	hours
Preparation per Contact Hour of Repeated Lecture (CHRL)	1	hour
Preparation per Contact Hour of Original Tutorial (CHT)	1	hour
Preparation per Contact Hour of Repeated Tutorial (CHRT)	0	hour
Innovation Preparation per CHL	1	hour
First Time Preparation per CHL	2	hours
First Time Preparation in Flexible Mode (UQ2U) (in addition to First Time Preparation) per CHL	Up to 4	hours
Consultation per CHL (fixed component)	1	hour
Consultation per CHRL	0	hour
Consultation per CHT	1	hour
Consultation per CHRT	0	hour
Consultation per number of student enrolled (NSE) in a given course (variable component)	0.1350	hour per NSE
Cap on Consultation per NSE per course	35	hours
Discount for Admin/Tutor (A/T) support in Consultation per NSE	1/3	multiplier
Cap on Consultation with A/T support per NSE	35	hours
Assessment Development per CHL	2	hours
First Time Assessment per CHL	1	hour
Co-Badged Courses Assessment per CHL per (Code -1)	0.25	hour
Marking per Education Workload	75	hours
Course Coordination per CHL (fixed component)	1	hour
Course Coordination per NSE in a given course (variable component)	0.1350	hour per NSE
Cap on Course Coordination per NSE per course	35	hours
Discount for Admin/Tutor (A/T) support in Course Coordination per NSE	1/3	multiplier
Cap on Course Coordination with A/T support per NSE	35	hours
Co-Badged Course Coordination per CHL per (Code -1)	0.25	hour
Tutorial Coordination per CHT	1	hour
First Time Tutorial Coordination per CHT	1	hour
Tutor Coordination per NSE in a given course (variable component)	0.0625	hours per NSE
Cap on Tutor Coordination per NSE per course	16.25	hours
Discount for Admin/Tutor (A/T) support in Tutor Coordination per NSE	1/3	multiplier
Cap on Tutor Coordination with A/T support per NSE	16.25	hours
Supervision of 1 FTE Dissertation per week (1 st year PhD students)	0.375	hour
Supervision of 1 FTE Dissertation per week (other cases)	0.75	hour
Marking of 1 Dissertation	8	hours
Cap on Dissertation Supervision and Marking	172.5	hours