

## WORKLOAD POLICY<sup>1</sup>

### School of Economics, Faculty of Business, Economics, and Law, UQ

Many diverse tasks and duties need to be accomplished by academic staff in order to meet the needs of their own professional careers, as well as those of the School of Economics (SoE). The design and operation of School governance, including the allocation of education and service tasks and other responsibilities, should promote excellent outcomes consistent with the strategic goals of the School and University and comply with the University of Queensland (UQ) Enterprise Agreement (EA) and other relevant Faculty and University policy requirements.

This document provides a framework for determining the fair and equitable allocation of education and service activities to academic staff within the SoE<sup>2</sup>. From 2021, the following overarching principles will be adopted.<sup>3</sup>

#### 1. GENERAL PRINCIPLES

- 1.1 The SoE is responsible for the education, research and service workload allocations that fit within the UQ workload framework. Workload allocation must provide for a consistent, equitable and transparent allocation of workload to all academic staff, and is based on a collegial and consultative process. To support transparency, the agreed method of calculating comparative workload will be presented publicly within the School.
- 1.2 Academic staff may have different strengths and responsibilities and contribute to the School in varied ways; education workload allocations may reflect this different mix of responsibilities based on individual strengths and the requirements of the School.
- 1.3 Allocations of responsibilities should incorporate the expertise and aspirations of academic staff for career development<sup>4</sup> and accommodate these in so far as is reasonable, equitable and consistent with other obligations and needs of the School.
- 1.4 The academic workload allocation will be made publicly available within the School prior to the start of each academic year. Any major changes should be discussed with and approved by the Head of School prior to implementation<sup>5</sup>. For timetabling purposes, a draft allocation

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<sup>1</sup> Draft date: 20/07/2020.

<sup>2</sup> 'Academic staff' refers to non-casual academic members of staff (full-time, fractional time and contract) in the School whose employment is governed by the UQ Enterprise Agreement.

<sup>3</sup> This document is a revised version of the 2019 SoE Workload Policy document, which benefitted substantially from the UQBS Education Workload Guidelines, from the UQ Academic Workload Tool Staff Guide and the UQ Academic Workload Tool Metrics Guide.

<sup>4</sup> It is duty of care that the allocation supports career advancement of junior academics.

<sup>5</sup> A copy of the School's workload allocations, and any changes, should be submitted to the School's Manager.

must be submitted in August, but should be finalised prior to the start of the academic year<sup>6</sup>. Staff members must be informed of their agreed workload allocation.

**1.5** In the event that unexpected changes occur after the workload allocation has been announced to academic staff, reasonable notice should be provided to affected staff and such changes should be mutually agreed<sup>7</sup>.

**1.6** The allocation of workload responsibilities must be adjusted as appropriate for periods of special studies program (SSP) and other types of extended leave (such as parental leave).<sup>8</sup>

## **2. OVERALL WORKLOAD**

**2.1** The overall workload will be designed to recognise balanced and valued contributions to the School's objectives and to avoid perverse incentives. The balance of workload across different dimensions will reflect the different expectations of the range of academic appointment types. These expectations may be expressed as minimum and/or maximum workload thresholds in some dimensions. The balance of workloads may vary between individuals and over time, and will in all cases reflect activities valued by the School and the University.

**2.2** The UQ Enterprise Agreement prescribes a maximum **number of hours** which a full-time academic can be required to work in a calendar year as 1725; approximately 37.5 hours per week over a 46-week working year (52 weeks less annual leave and public holidays).

**2.3** For the purpose of workload allocation, the SoE defines a **block** as 172.5 hours. Given this definition, and consistent with the UQ Enterprise Agreement, a full-time academic can be required to work up to 10 blocks in a calendar year.

**2.4** In the sections below, the School defines the Education and Service Workloads. The expected normal contributions to Education, Research and Service across each full-time academic role type are informed by the [UQ PPL](#) as follows:

- 1. For T&R staff:** Education between 3 and 5 blocks; Research between 3 and 5 blocks; and Service between 1 and 3 blocks.
- 2. For TF staff:** Education between 4 and 7 blocks; Scholarship of Teaching and Learning between 2 and 5 blocks; and Service between 1 and 3 blocks.

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<sup>6</sup> The previous year's finalised workload allocation should also be submitted as a record.

<sup>7</sup> If agreement cannot be reached, the operational demands of the university will take precedent.

<sup>8</sup> During SSP, the education workload will normally be reduced pro-rata. It will be kept the same and carryover be allowed only in exceptional circumstances requiring the authorisation of the Head of School.

In any given year, (a) the workload of each staff member will be determined ex-ante to fit within the lower and upper limits specified above, (b) the education workloads of TF staff will generally be 50% higher than the education workloads of T&R staff, and (c) to ensure equitable allocations across staff, the ex-ante education plus service workload of each T&R (resp. TF) staff member will generally lie within  $\pm 0.5$  blocks of the average ex-ante education plus service workload of all T&R (resp. TF) staff.

**2.5** Specific workloads associated with different education and service activities are detailed in separate documents. Specific ranges of workload apply to staff (levels B-D) under probation, as detailed in the appendix to this document.

**2.6** The workload measurement will be based on objective evidence drawn from University Policy and Procedures and other authoritative University systems on a regular basis where possible.

### **3 EDUCATION WORKLOAD**

**3.1** What constitutes 'education' has become highly complex, and these education workload principles seek to recognise the impact of pedagogical changes on all teaching and learning activities. Consistent with policies and definitions that apply throughout the University, a wide array of teaching and learning activities are included for the purposes of the education workload allocation. The design, mode and delivery of programs and courses should provide a high quality student experience.

**3.2** Fractional appointments or varying/alternative academic profiles (such as staff on SSP) should have workload allocations calculated pro rata<sup>8</sup>.

**3.3** An education 'block' is conceptualised broadly to encompass a wide range of education activities associated with a course. This could include face-to-face teaching, the ongoing preparation, updating and revision of course materials, course administration, course co-ordination, student consultation, development of assessment and marking, tutorial co-ordination, tutorial preparation and delivery, as well as dissertation supervision and marking<sup>9</sup>.

**3.4** The SoE Education Workload will take into account a wide variety of education activities separately. By doing so, the School will be able to reflect courses that are becoming more diverse with the introduction of new technologies and interdisciplinary themes. With new technologies, some courses may only require course co-ordination and marking in Summer Semesters. New interdisciplinary courses require guest lectures and then a separation between course co-ordination and lecture delivery.

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<sup>9</sup> This refers to dissertations of HDR, Honours and Master students within UQ.

**3.5** Ongoing course development and innovation is important to achieve the School's objectives. Conceptualising a block in terms of a total number of hours per course recognises the importance of course development and innovation as we transition towards more blended learning experiences for our students. Examples of such course innovations might include: recording of online lectures (desktop recordings or in-studio), assessment explainers, video case studies, introducing new in-class learning activities and adopting classroom-based technologies. Support for academics to introduce course innovations is available from the Faculty's Learning Design team.

**3.6** In conceptualising an education load in line with the EA and total teaching hours, we recognise that there is scope for innovation and development to take place within the block allocation. As an example, a 4-block education workload might involve all course co-ordination, lecturing and tutoring in two medium sized courses (including contact hours, innovation and preparation, administration, consultation, and marking), plus student supervision and thesis marking.

**3.7** The education workload recognises that a 'block' may involve a broad range of education and education related activities. For instance, a block might be involve the design of a new program; non-classroom teaching i.e. on-line forums; significant teaching innovation; study tours and/or other out of classroom activities, such as supervising consulting projects; working with or advising an external education partner to develop new programs; leadership and administration of education activities; and MOOCs and other online courses<sup>10</sup>.

**3.8** A default requirement is for academic staff to teach a minimum of 75 students per year.

**3.9** Exceptions to these education workload guidelines will be uncommon and require the approval of the Head of School (or delegate). Some examples of exceptions include ARC & UQ Fellowships, full-time senior administrative positions, and secondments to prestigious positions with government, public or business organisations.

## **4 SERVICE WORKLOAD**

**4.1** To provide a fair and equitable workload allocation and encourage the uptake of large Service roles, any Service allocation beyond 2 blocks provides a requisite reduction in education workload allocation. For example, if an academic staff member of the School is allocated 3 blocks of Service, then 1 block will be deducted from the standard educational workload allocation for that academic staff member in that year.

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<sup>10</sup> Approval of Director of Education and Head of School required and will be dependent on the scale and nature of the activity.

**4.2** All academic staff in the School are expected to generally attend and participate in School, Faculty and UQ events (examples are Graduations, Open Days, one-UQ activities, supervision of academic staff, participating in ad-hoc committees, School and Faculty meetings, etc.). The workload associated with these so-called **general citizenship** activities is deemed to be the equivalent of 0.75 blocks.

**4.3** Formal Service Roles within the School involve different workloads depending on the time requirements of each role, as detailed in a separate document.

**4.4** Formal Service roles within the Faculty and UQ more generally may be recognised as School Service for purposes of workload calculations.

**4.5** Some professional activities undertaken by academic staff significantly enhance the reputation of the School and the University. Some of these activities may be recognised as Service Workload for purposes of workload calculations. For example, and subject to approval,<sup>11</sup> serving as **Editor-in-Chief (or equivalent) of an A\* journal** may be recognised as a workload of up to 1.5 blocks.

## **5 LARGE COURSE ADMINISTRATIVE SUPPORT**

The School acknowledges that coordinating large courses requires increased time to administer. Various levels of admin support are provided for large courses depending on the size, nature, level and scope of the course.

## **6 CARRYOVERS**

**6.1** Workload allocations will be based on evidence of planned activity, with the exception of student supervision, thesis marking and short-notice teaching opportunities. Allocations of research student supervision and thesis marking will be notional allocations that are informed by average supervisory and marking loads over the previous 3 years.

**6.2** The School will assign teaching and service responsibilities on an annual basis and carryovers are generally not permitted. However, in some circumstances, where it benefits a staff member and the School, special teaching and service credit arrangements may be made over two years, subject to approval by the Head of School.

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<sup>11</sup> To be approved by the Director of Research and the Head of the School and dependent on the work load associated with the journal editorship role. Education workload reduction for ARC (or equivalent) grants will be regulated by the buy-out policy of the School.

**6.3** With 6.2 as a caveat, Education and Service allocations will be measured ex-post and any excess over 1 block will be considered for carryover to the allocation in the following year, subject to approval by the Head of School. However, in the scenario where it is not possible to make adjustments within the academic year for periods of extended leave (such as parental leave) and as a result the staff member's workload allocation is over 1 block ex-post, any excess of 1 block will automatically be carried over.

## **7. FOR FURTHER REFERENCE**

The following documents are referred to throughout these workload principles:

[UQ Workload Allocation for Academic Staff \(PPL 5.41.07\)](#)

[UQ Academic Categories – Procedures \(PPL 5.41.12b\)](#)

[UQ Enterprise Agreement 2018-2021](#)

[UQ Consultancy, Secondary Employment and Internal Work policy \(PPL 1.50.02\)](#)

[UQ SSP Policy Guidelines \(PPL 5.80.02\)](#)

[UQ Academic Staff Performance](#)

[UQ Promotion of Academic Levels A-D \(PPL 5.80.12\)](#)

[UQ Promotion to Professor \(PPL 5.80.14\)](#)

## APPENDIX:

Specific ranges of workload apply to staff (levels B-D) under probation, as detailed below:

- **For Level B T&R staff in the first year of their probation:** Education between 1.6 and 3.6 blocks; Research between 5.15 and 7.15 blocks; and Service between 0.25 and 1.25 blocks.
- **For Level B T&R staff under probation (after year one):** Education between 3 and 5 blocks; Research between 3.75 and 5.75 blocks; and Service between 0.25 and 1.25 blocks.
- **For Level B TF staff in the first year of their probation:** Education between 3.3 and 6.3 blocks; Scholarship of Teaching and Learning between 3.2 and 6.2 blocks; and Service between 0.5 and 2.5 blocks.
- **For Level B TF staff under probation (after year one):** Education between 4 and 7 blocks; Scholarship of Teaching and Learning between 2.5 and 5.5 blocks; and Service between 0.5 and 2.5 blocks.
- **For Level C and D T&R staff under probation:** Education between 3 and 5 blocks; Research between 3.5 and 5.5 blocks; and Service between 0.5 and 2.5 blocks.