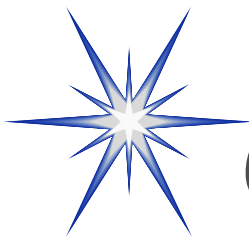


*Management of  
Academic Workloads:  
A Tool for Change*

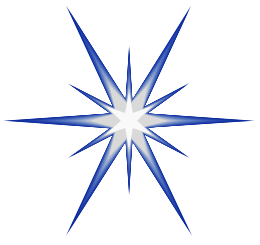
**Peter Barrett and Lucinda Barrett**  
**University of Salford**

**Supported by LFHE and HEFCE**



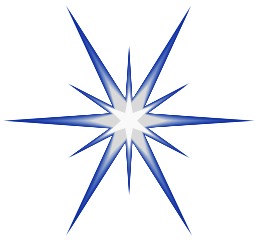
# *Context*

- ◆ **Pressure** within sector - management of **quality** and **resources**, RAE, etc
- ◆ **Sector Surveys** - Kinman and Jones, Winefield et al - show **staff pressures and stress**. Volume and diversity of work problematic
- ◆ **Universities' difficulties** in demonstrating how staff spend time – eg TR.
- ◆ **Problem of tensions** between cultural norms of academics - **autonomy v managerialism**



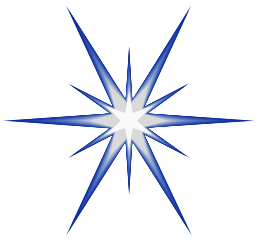
# *Academic workloads - quantitative view*

- ◆ **Kinman and Jones' (2004) study**
  - ◆ 69% “I find my work stressful”
  - ◆ 42% regularly undertake over a fifth of work on weekend / evenings
  - ◆ 38% found work “manageable” against HSE benchmark of **85%**
  - ◆ 59% working +45 hours / week compared with 66% in 1998
  - ◆ **Low** correlations ( $\sim 0.12$ ) between hours worked in term-time and psychological well-being measures



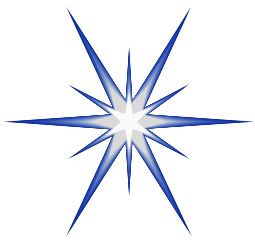
# *Academic workloads - qualitative view*

- ◆ **Kinman and Jones' (2004) study**
  - ◆ 72% intrinsically satisfied with work owing to intellectual stimulation, working with students, etc
  - ◆ 65% complain too much administrative paperwork / QA – common cause of stress
  - ◆ One of most frequent suggestions for the improvement of work related stress: **“The need for managed allocation of workloads and transparency in workload planning”**

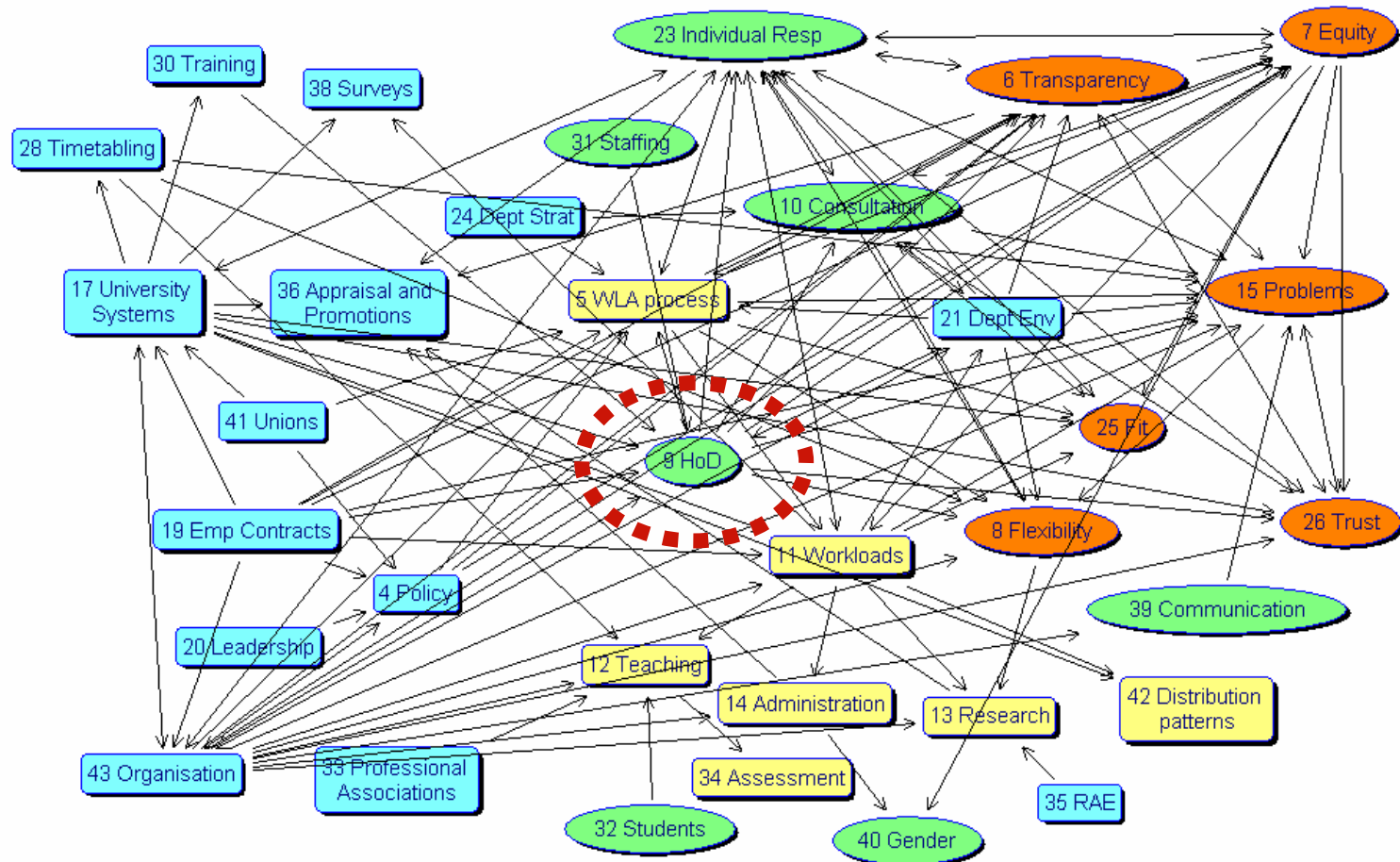


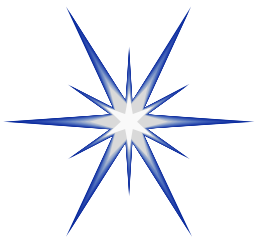
# *LFHE project*

- ◆ **Case study approach**
- ◆ **Not random, but selected for **diversity** - both across and within universities.**
- ◆ **Sampling frame for cases - on grouping (1994, Russell, CMU, etc); Size (10,000-47,000) and regional location.**
- ◆ **Total 8 universities, plus 2 non HE orgs.**
- ◆ **Cross-sectional sample of 7 interviews within each case**
- ◆ **59 interviews. Transcribed within agreed ethical procedures.**



# *A complex situation!*





# *Typical satisficing responses - policy*

- ◆ **University workload policy**
  - ◆ Each department should develop its own system
  - ◆ Should have various features, eg transparent, equitable, etc
- ◆ **Staff satisfaction surveys typically highlighting workloads as an issue, but felt need to act not highest priority.**  
*“Rumblings, but no systemic pressure to get it sorted out”.*
- ◆ **And ... no-one outside Personnel ever seems to know about the policy anyway!**



# Current practice

Advantages

+

Disadvantages

- Can be flexible / adaptive to changes
- Useful if intimate department with work demands tuned well to individual needs and aspirations

- Transparency easier to see and equity easier to demonstrate
- Model can be tweaked in response to consultation
- Good for larger departments – can see outliers
- Heads can fine tune
- Model can weight elements – such as assessment load
- Can work to accommodate employment contract hours

- Advantages of “partial”, plus ...
- Equity and transparency demonstrated with a tangible sense of loads
- Good for complex inputs and can accommodate different staff role preferences
- Ease of linking to faculty level data and other systems

## Informal

7a–2a–6b–7b–3b

- Hard for Head to know all staff / activities if large department and inefficient to do
- Hard for individual to measure “equity” and potential problems for transparency, so difficult for Head to “defend” decisions
- Problems accommodating large differences in task size
- Difficult to feed to faculty level data

T

T+A

T+R

## Partial

3a

1b–1a

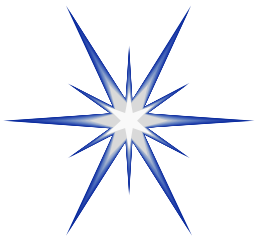
4b

- Not inclusive of all tasks
- Criteria for Head’s choices unclear
- Danger of comparisons / quibbles if very detailed
- If using representative hours system may not be realistic
- Teaching peaks still not accommodated

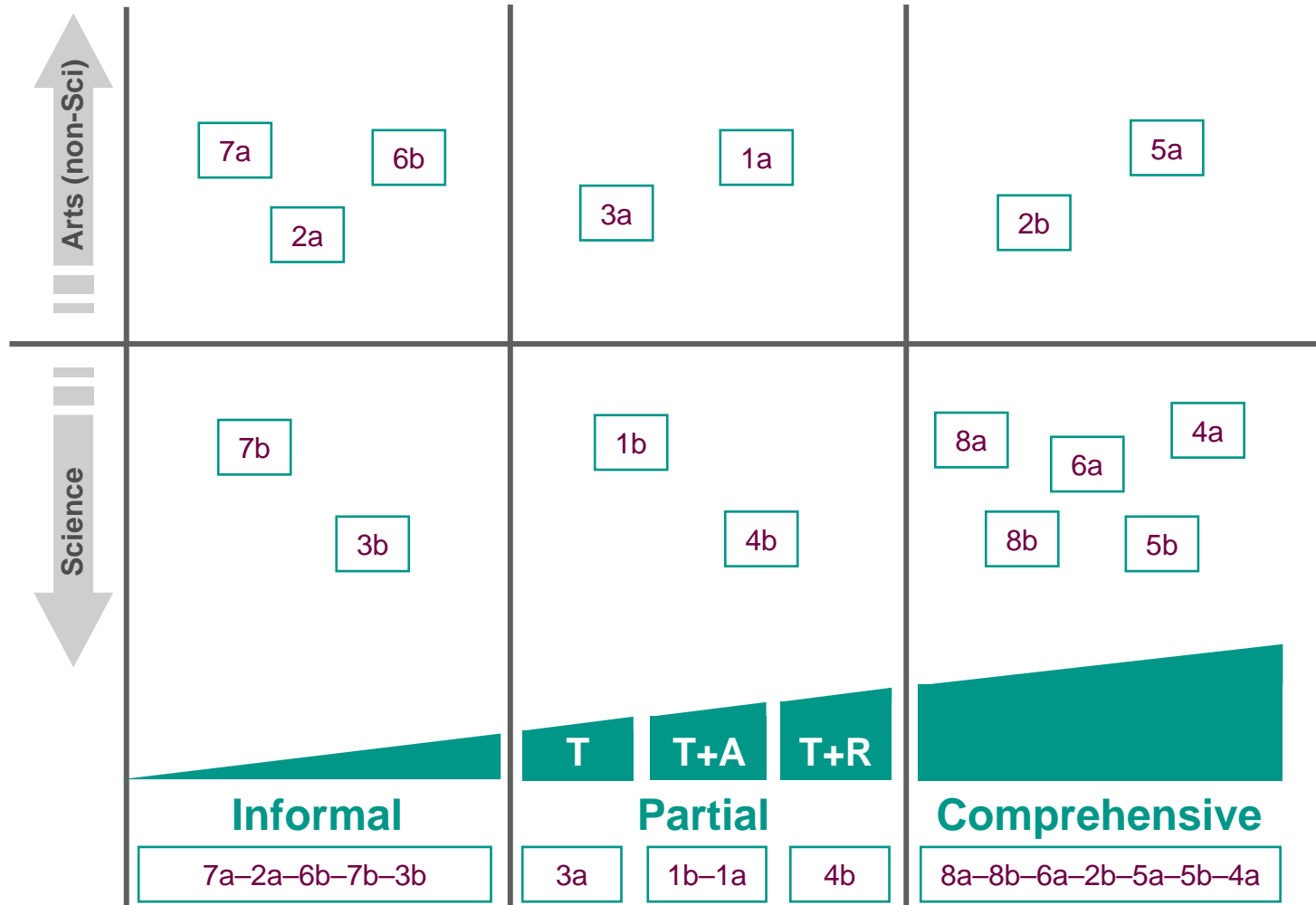
## Comprehensive

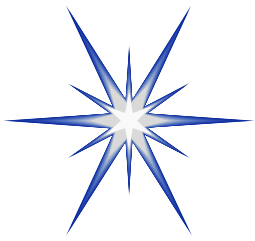
8a–8b–6a–2b–5a–5b–4a

- Some models may seem inclusive, but cap elements for research or give retrospectively as inflexible in-year
- Danger that low R allocations seen as “punishment” by staff with more T, thus danger of polarising staff between T and R
- Can limit necessary scope for “local” judgement by Head

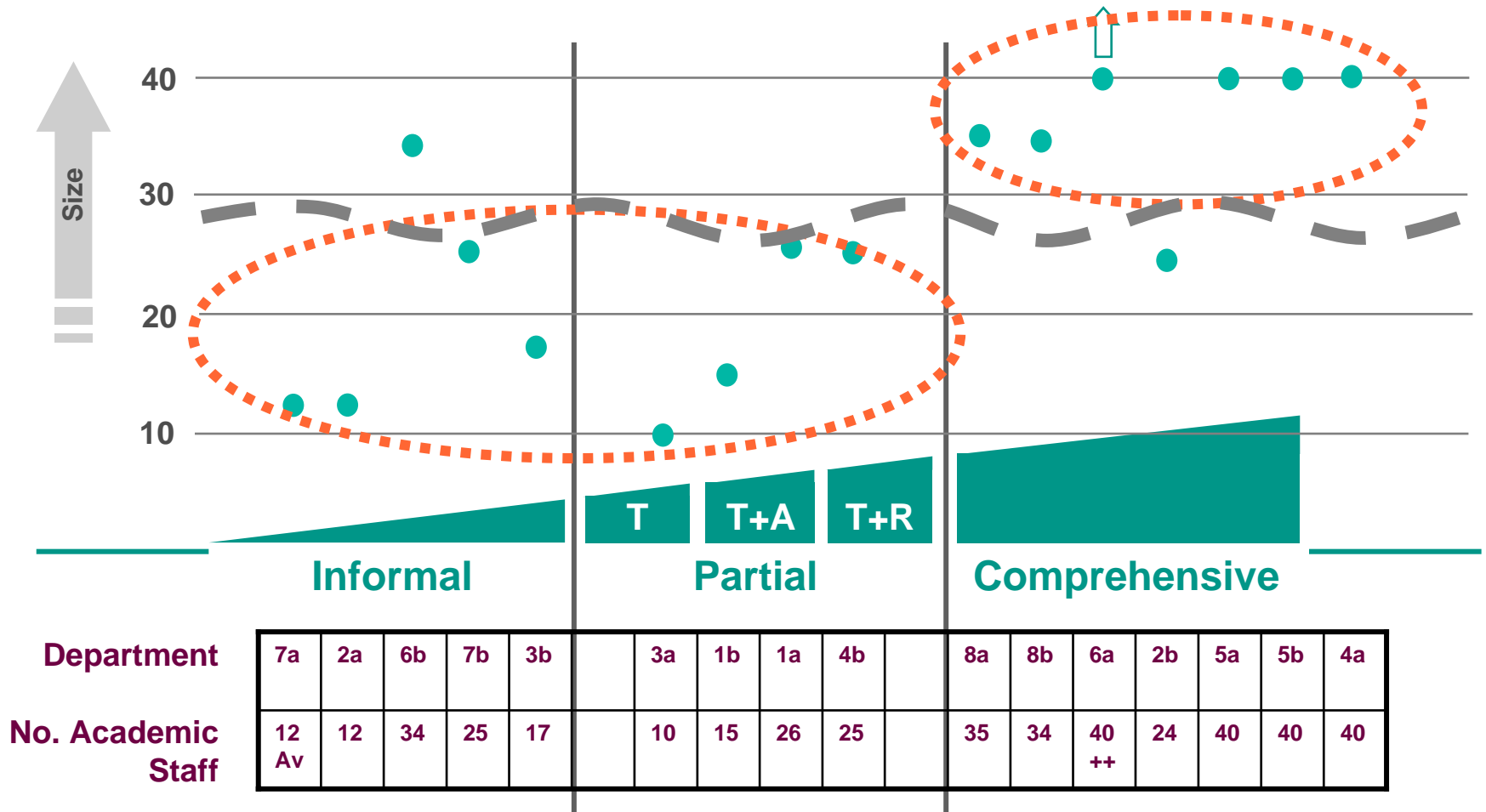


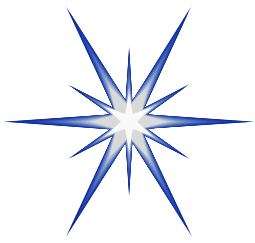
# *Discipline specificity?*



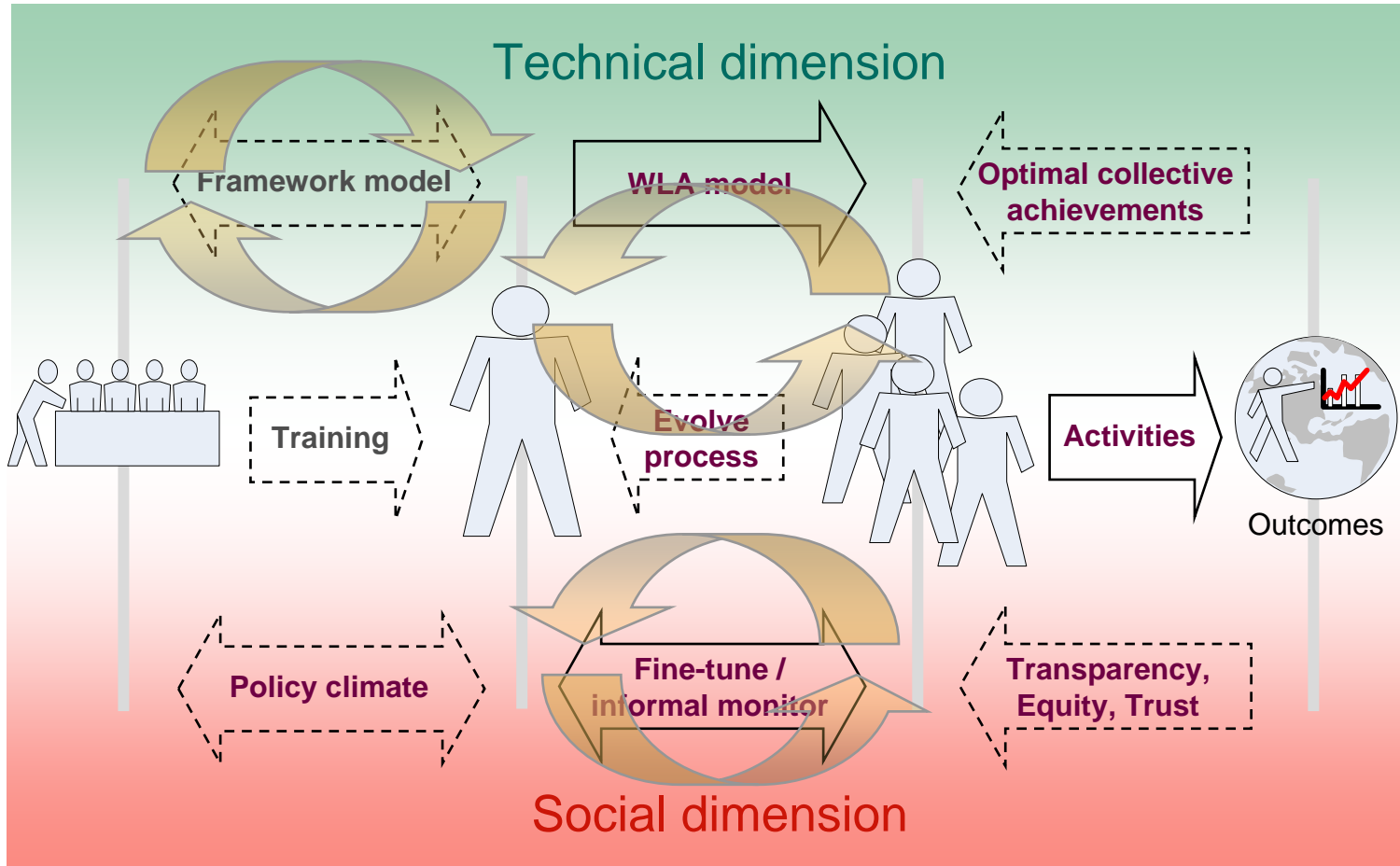


# *Size against formality*





# *Idealised Dynamic socio-technical process*



Technical dimension

Framework model

WLA model

Optimal collective achievements

Training

Evolve process

Activities

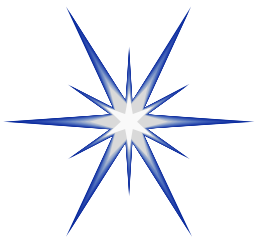
Outcomes

Policy climate

Fine-tune / informal monitor

Transparency, Equity, Trust

Social dimension



# *Eg Link to TR (2000)*

**Government demands for transparency**

**Transparency costing information**

**Activity costing analyses**

**University financial data**

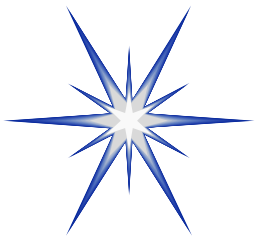
**Activity costing information**

**Schools and faculties efforts to allocate workloads / understand costs / value**

**% staff workloads by T (per module), R and E**

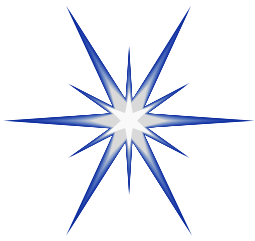
**Summary workload allocation data**





## *Eg Link to Equality*

- ◆ **A major issue in HE is low % female senior staff**
- ◆ **Some soft evidence around MAW**
  - ◆ **Need to understand earlier phases**
  - ◆ **Maybe types of role – open-ended eg pastoral**
  - ◆ **Needs further investigation**



# *HEFCE MAW Network*

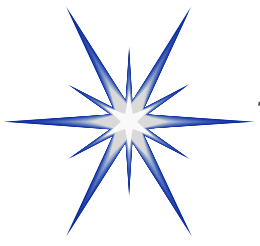
- ◆ Brunel University
- ◆ Exeter University
- ◆ Greenwich University
- ◆ Keele University
- ◆ Kent University
- ◆ Liverpool University
- ◆ Napier University
- ◆ Royal Agricultural College
- ◆ Sheffield Hallam University
- ◆ University College Falmouth
- ◆ University of Salford
- ◆ University of Wales Institute Cardiff

## **Focus on implementation**

Typically ...

- Audit existing practices
- Identify good practice / enthusiasm at school / faculty level
- Plan progressive implementation process over several years
- Resource!

[www.research.salford.ac.uk/maw](http://www.research.salford.ac.uk/maw)



# *Proactively Managing - Single / double loop action*

More effective strategic alignment and impact through **synergetic linking** with other performance systems

Increased pressures / reduced resources plus unmanaged workloads leading to **high levels of stress**

**Context pressure**

Financial erosion, multiple audit requirements and major policy changes leading to **turbulent sector**

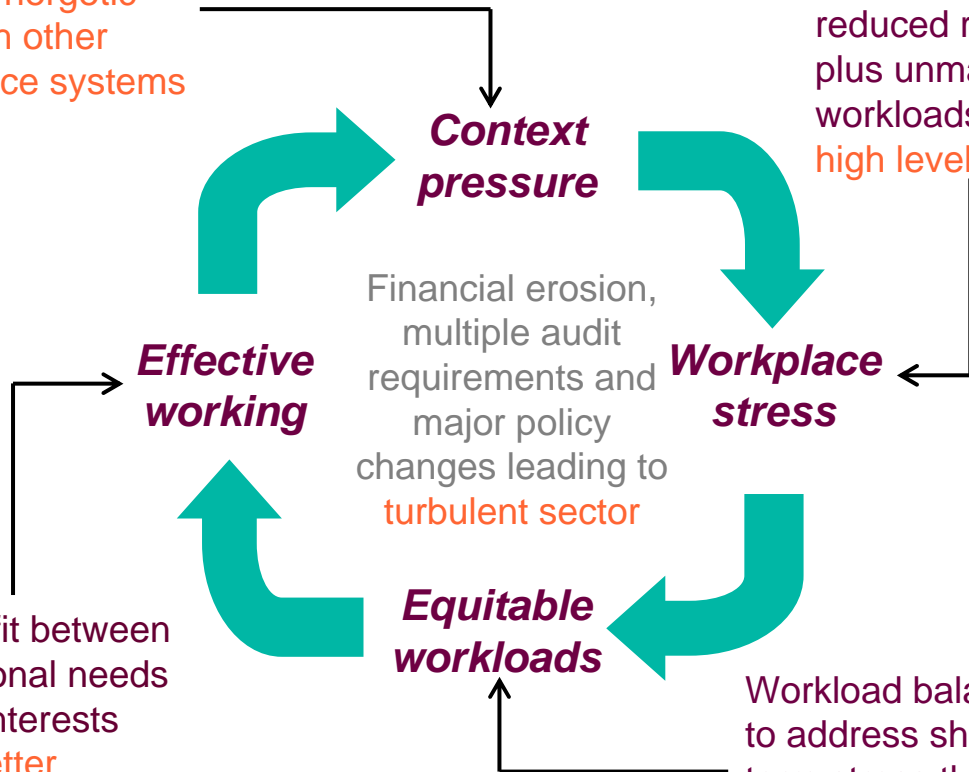
**Workplace stress**

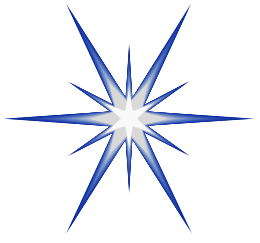
**Effective working**

**Equitable workloads**

Improved fit between organisational needs and staff interests through **better understanding** of human resources

Workload balancing to address short term stress through **fairer distribution** of work





# Questions / discussion