

Workload Planning Review Group Meeting

Meeting Minutes – Tuesday 26th April 2022

Teams Meeting

Attendees:

Karl Leydecker, Laura Benvie, Marion Campbell, Chris Collins, Sarah Duncan, Debbie Dyker, Garry Fisher, Amanda Lee, Laura McCann, David Muirhead, Brian Paterson, Adam Price, Syritha Pugh, Ruth Taylor, Neil Vargesson, Sam Waldram (Clerk)

Apologies:

Brian Henderson, Tracey Slaven, Hulda Sveinsdottir

1. MINUTES OF THE ACADEMIC SUB-GROUP MEETING

- 1.1 The minutes were accepted as accurate.
- 1.2 There were no additional actions or matters arising from the minutes.

2. FUTURE MEETING AGENDAS

- 2.1 It was agreed that future meetings would involve all members, with general workload issues being discussed first and academic specific workload issues being discussed in the second half of the meeting. Group members were free to stay for the full meeting or leave following the general items if they felt the academic work was not relevant for them

3. UPDATE ON WORKLOAD ISSUES FOR PROFESSIONAL SERVICES STAFF

- 3.1 This item was postponed and will be discussed at a future meeting.

4 STAFF:STUDENT RATIO MODELLER

- 4.1 KL gave a brief demonstration of the Staff:Student Ratio Modeller. The model included Staff FTE and Student FTE figures for each School which could be broken down further by subject. These ratios were then plotted against sector norms in quartiles. The model was a more scientific approach to staffing levels than had been used previously. It was confirmed that the data used was the same information used in the HESA return so it included information on track etc. The only thing missing from the model was a calculation in respect of overseas load.
- 4.2 The initial aim of the process was to address issues in areas that were currently in the lower quartile and then gradually move all Schools up. The ultimate aim of the process was to get all Schools up to the top of the second quartile or bottom of the top quartile. However, this process would take years to complete.
- 4.3 It was agreed that the model looked helpful and it was beneficial that Schools had access to the data. It was confirmed that there appeared to be no correlation between the levels of staff in Schools and the results, good or bad, within the Staff Survey 2020.

4.4 It was discussed whether the ratio of Academic staff to Support staff had been considered. It was confirmed that this was not a metric that was currently generated or monitored systematically but that SAMs were responsible for ensuring that cases were brought forward where growing student or staff numbers warranted an increase in resource, and the review of technicians will also need to consider how to determine the level of resource required to support particular levels of research or teaching activity.

5 SUPPORTING STAFF WELLBEING IN HIGHER EDUCATION REPORT

5.1 The group received and noted the executive summary of the report. It was agreed that the report was important as it addressed the effects of higher workload on staff in the sector. The fact that the issue needed to be addressed on a national level was also discussed. There was recognition that high workload was one of the issues included in the 2022/2023 Pay Negotiations which were currently ongoing, and although pay was the main focus at the moment in the meetings the issue would factor in future discussions.

5.2 Discussion focused on finding 9 in the report (Seeking help for work-related stress and mental health can be stigmatised in UK universities), where it was noted that this was the subject of considerable focus by the Mental Health Working Group to ensure that all possible steps are taken to try to ensure this is not the case at the University. .

6 INTERIM REPORT AND FEEDBACK FROM SENATE ON GENERAL WORKLOAD ISSUES

6.1 KL confirmed that there would be further discussions held with Senate in relation to the Academic Workload Model. In the meantime the interim report had been circulated to Senate members and some feedback had been received. This was detailed in Appendix 4 and had been split between general workload issues and academic workload issues. There was only a small amount of feedback so far but more was expected. Issues which had been raised included problems with systems and IT as well as how large grants are to be treated in the workload model.

6.2 Another area of contention which had been raised was that of sabbaticals. It was agreed that this was an important area which was worthy of further discussion as there was wide differences on how leave was granted throughout the University. MC confirmed that she had looked at this area previously and implemented a university wide process for sabbaticals. However, it did appear that there were differences between Schools on how this was implemented. The issue was currently being looked at again to ensure the process was fit for purpose and to try and bring consistency across the board in terms on implementation.

Action: MC

6.3 BP highlighted the importance that was being given to the Citizenship category in the discussions being held in the Reward Strategy Group. Currently there was no way of rewarding support staff for their endeavours in this area and this needed to be considered.

7 REVIEW OF OUTSTANDING OR PLANNED ACTIONS ON GENERAL WORKLOAD ISSUES

7.1 It was recognised that any ability to undertake a Deep Dive into areas which had been identified as having workload issues within the Staff Survey, would be dictated by the level of staffing and capacity within the Health , Safety & Wellbeing Team. Due to this, there would be no immediate action taken in this area. GF advised that he would approach the matter by using the HSE Tool and look beyond workload. The Staff:Student Ratio modeller had shown there was no correlation between staffing levels and the Staff Survey results so other issues would also have to be investigated.

- 7.2 In terms of Focus Groups it was thought that these would help to identify workload pressures at different times of the year. This had been discussed at UMG and Estates & Facilities were keen to be part of this. Areas of difficulty had been identified in relation to the budget cycle and the same had been an issue for IT projects. It was clear from this that there were year-round patterns which needed to be identified and investigated. It was discussed that it would be good to get a mixture of Schools and Directorates for the focus groups. KL advised that he would discuss how to move this forward with TS. **Action: KL**
- 7.3 SP felt that the Staff Survey results were more than just a snapshot in time when the survey was conducted as staff responded to the questions based on their memories of the preceding year not just how they were feeling at that precise moment.
- 7.4 KL confirmed that that wider issue of the changes in the student population was being discussed at SMT level and would be brought forward for discussion at Senate as well. There were wider issues associated with this such as systems, processes and people all of which needed to be considered, both in Schools and Directorates. It was agreed that this was a big piece of work and it would need to be continually revisited.
- 7.5 There was discussion around the Technical Staff review and how Technicians could be employed under a Research only grant but in their role they ended up helping out in all areas due to the fact that core staff did not have the capacity do so. This meant that the grant work that they were employed to do wasn't getting their 100% focus due to lack of core staff provision. It was agreed that this would need to be looked at within the Technical Review. This issue highlighted the fact that there were several work streams which interconnected with the Workload Planning Review Group. These parallel pieces of work needed to be tracked to ensure they were moving forward. **Action: SW**
- 7.6 The matter of annual leave was discussed. It was highlighted that there were inconsistencies within Schools as to how Academics requested leave, the systems they used and how it was recorded. This made it difficult for Line Managers to know if staff were using leave or had a high number of days outstanding. Discussions in another forum had highlighted that some areas successfully used MyHR for the requesting and approval of leave. It was felt that it would be helpful if all Departments were able to use this system. DD confirmed that the system had not been optimal in the past but work was currently being undertaken which would soon lead to the roll out of a system upgrade. Training would be provided in respect of the changes and this would help in relation to using the system for leave. KL agreed that better systems would lead to better data which in turn would lead to better management and leadership.

8 REVIEW OF CAREER TRACK ACTIVITIES

- 8.1 KL thanked AL and the rest of the group members who had been involved in pulling the categories together. The group was asked to confirm if they thought it worked, what they thought was missing and whether it was good enough to go out for wider consultation within the University.
- 8.2 There was discussion regarding whether certain items such as peer reviews and editorial boards should be categorised under Research or Citizenship. Also whether areas such as examinations etc. should be under multiple categories. MC confirmed that the items discussed should be under Research as they were part of research culture and routine parts of research.
- 8.3 There was additional discussion in respect of personal tutoring for PG students as it was felt that this was a significant amount of work. It was agreed that this would have to be discussed further regarding where this sits as feedback from Senate had also highlighted this issue. **Action: All**

- 8.4 It was confirmed that HEA recognition would need to be changed to Advanced HE as this had changed. **Action: SW**
- 8.5 The role of the promotions review was acknowledged in terms of the categories that staff would be evaluated against and how both processes needed to be aligned.
- 8.6 In respect of the Scholarship category it was highlighted that it should be made clear that the list was not a contractual list of duties. It was also noted that staff who undertook scholarship duties did not feel that what had been included necessarily matched what they did. The suggestion was made that staff working in this area were specifically consulted in relation to the items on the list. RT confirmed that there had been some consultation with staff in respect of Scholarship and the main issue which arose from that was in relation to what the actual definition of Scholarship was. **Action: RT**
- 8.7 It was discussed whether the group needed to be more upfront about the proposed changes from a 40%/40%/20% model to a proposed 45%/45%/10% model. This would help explain why some activities were moving from a certain category into another as there was now more, or less, scope within the new categories. It was felt that those who had been consulted with so far were broadly content with the proposed model. Once amendments had been made to the lists it could go out for wider consultation and aligned with the promotions work. **Action: KL**
- 8.8 Whether installing IT updates should be included as an item was discussed. It was agreed that this varied depending on the types of specialist software used by staff and as such varied significantly between different schools. This meant it would be too hard to capture.
- 8.9 It was agreed that the list from Appendix 6 would be posted on the Teams Site and members of the group could comment on the document with the aim of finalising it prior to wider consultation. **Action: All**

9 UPDATE IN RESPECT OF MANAGEMENT RELATED TASKS IN SCHOOLS

- 9.1 KL thanked SD for compiling the list of management related tasks which take place within Schools. The list would be sent out to Schools to see if the tasks listed were those that staff spent blocks of time on. The group was asked to consider if it was helpful because a standard list of these tasks would need to be included in the Workload Model. SD confirmed that it was not meant to be an exhaustive list of tasks but it should cover those generally undertaken in most Schools. **Action: KL**
- 9.2 There were further suggestions for the list provided by the group in the Teams Chat and SD was asked to collate these and add them to the list prior to forwarding to KL and SW. **Action: SD**

10 REVIEW OF OUTSTANDING ISSUES – ACADEMIC WORKLOAD ALLOCATION

- 10.1 It was acknowledged that there were a number of issues which had to be reviewed to decide if they still needed to be addressed or were no longer relevant in respect of the groups work. It was agreed that the list would be posted on Teams for the group to review. It was also agreed that MC was to look at research related items and RT to look at teaching related items. The importance of involving the Vice-Principal Regional Engagement and Regional Recovery in consideration of knowledge exchange related items was also noted **Action: SW/MC/RT**
- 10.2 In respect of knowledge exchange it was highlighted that in the Technical Review, if the University moved towards employing Apprentice Technicians again in the future, the knowledge exchange from Academics was an important part of an apprentice's learning.

11 ANY OTHER BUSINESS

11.1 The need for additional work to be done in respect of the Workload Teaching Allocation Model was discussed. The work done so far will be reviewed in order to move this matter forward but it was recognised that this was a big piece of work.

11.2 The support of Planning would be needed to help model and pilot the workload models going forward and currently they did not have the resource available to assist with this. It was hoped that once additional staff were on board this could be looked at further.

MEETING CLOSED.

12 ACTIONS

Reference	Description	Action by	Action Date
02Mar22 Section 3.3	Develop roadmap of the next steps for further analysis of the Staff Survey data	K Leydecker	Ongoing
02Mar22 Section 4.4	Review of Section 5.1 to see which items are still relevant	All	Prior to next meeting.
02Mar22 Section 4.5	Teaching Model Allocation within section 5.3 to be on next agenda.	S Waldram	Future Meeting
26Apr22 Section 6.2	Review of Sabbatical Leave process and application in Schools	M Campbell	
26Apr22 Section 7.2	Discuss how to address the issue of identifying workload on an annual cycle.	K Leydecker T Slaven	
26Apr22 Section 7.5	Compile and update list of parallel projects which impact on the Workload Planning Review Group.	S Waldram	
26Apr22 Section 8.3	Further discussion on feedback regarding personal tutoring and where this element should sit in the Workload Model.	All	Include on agenda for next meeting.
26Apr22 Section 8.4	Update items in Appendix 6 from HEA to Advance HE	S Waldram	
26Apr22 Section 8.6	Wider consultation with Scholarship staff on duties which are undertaken.	R Taylor	
26Apr22 Section 8.7/8.9/9.1	Wider consultation required on the Workload Model and items within each of the categories in Appendix 3, 6 and 7.	K Leydecker	
26Apr22 Section 8.9	List of categories from Appendix 6 to be posted on Teams. Members of the group to comment with a view to finalising the list prior to wider consultation.	S Waldram All	
26Apr22 Section 9.2	List of Management Tasks from Appendix 7 to be updated in line with comments from group members during the meeting.	S Duncan	
26Apr22 Section 10.1	Review of items in Appendix 8 to ascertain their current relevance.	M Campbell R Taylor	
26Apr22 Section 10.1	Appendix 8 to be posted on Team for comments by group members.	S Waldram All	