



Workload Allocation Model

University of Exeter Business School
2024-25



University of Exeter
Business School

UEBS Workload Allocation Model

The Business School's WAM for 2024-25 largely rolls forward the 2023-24 WAM. As last year we adhere to the University's *Academic Workload Planning Principles and Processes*, but as the School remains autonomous within the Faculty in respect to workload planning, we note the new *ESE Faculty Workload Policy*, but largely continue with our previous practices as they better align our strategy, operational needs, and staffing. In considering revisions for 2024-25 we sought comments from across the School, and these were discussed by the School Leadership Team (SLT). Most of the comments related to the implementation of the WAM and associated communication rather than specifics of the WAM. But we have made minor changes for 2024-25, a summary of which can be found on pp. 10-11.

- University information on workload planning can be found at: <https://www.exeter.ac.uk/departments/policyandplanning/workloadplanningteam/>
- The University's *Academic Workload Principles and Processes* document can be found at: <https://www.exeter.ac.uk/departments/policyandplanning/workloadplanningteam/>
- The *ESE Faculty Workload Allocation Policy* can be found at:
- <https://www.exeter.ac.uk/departments/policyandplanning/workloadplanningteam/policy/>

Heads of Department (HoD) apply our WAM, and also have the flexibility and discretion in assessing individual academic workloads necessary to achieve consistency and fairness. They are supported in these decisions by Associate Deans (AD), Directors of Research & Impact (DoRI), and Directors of Education & Student Experience (DESE). Workload allocations may be reviewed by ADs and the Deputy Pro-Vice Chancellor/Dean. Staff may appeal workload allocations through a meeting with the DPVC/Dean and the Head of Department.

Teaching Allocations

The process of assigning teaching for the 2024-25 academic year is:

- HoD determines allocations in conjunction with DESE. While they hold responsibility for allocations, aspects of the process may be delegated to Deputy HoDs, Subject Leads, Directors of Education, and other deputies depending upon departmental structure.
- Departments may choose to publish the teaching schedule for all staff.

Research and Scholarship Allocations

The process of allocating research and scholarship hours for the upcoming year is:

- Each member of staff has baseline research and scholarship hours.
- Additional research output hours allocated based upon review of research pipelines by HoD, DoRI, and ADR, via HoD Research Discretionary. This is confirmed by SLT.
- Additional impact case study hours based upon review by DoRI, HoD, & ADR.
- Funded research based upon time costed in awards (agreed by HoD and ADR).
- Maximum research hours are 1155.

Additional notes and guidance

To the greatest extent possible no individual should undertake workloads that are more than 10% above or below the nominal maximum workload appropriate to their fractional contract. Note that there is no triggering of additional payments for permanent staff working in excess of their target workload. The Business School does not carry forward workload hours to the following academic year. Heads of Department will, however, take note of workloads in the previous years when determining current and future workload.

Teaching and marking demands are largely predictable, and HoDs should ensure that staff are able to meet these demands in a timely, safe, and fair manner.

Where an individual is deputized into a role, unless a deputy role is specifically defined in the WAM the deputy will receive a percentage of the WAM role they are deputizing.

Distinguished Research Professors and Professors of Practice should have a clear workload allocation. Where they are working on conventional modules they should be allocated as usual. Their other work should be covered by a HoD Discretionary figure. Some or all of this may be attached to S&S where the work is linked to research and scholarship, or support thereof (ie HoD Research Discretionary), or work may be more appropriately allocated against HoD Teaching & Assessment Discretionary or HoD Admin & Service Discretionary.

Teaching, Supervision and Tutoring [*Teaching and Tutee Load in SWARM*]

Modules and Supervision				
Activity	Module Credit	Preparation (Hours)	Delivery (Hours)	Marking
Module Lead †	Any	40 (base) plus 1 per 10 students		
New Module Preparation *	15/30	Max 200/300*		
Module Refresh *	15/30	Max 50/100*		
Large Group Sessions	Any	3	1	
Small Group Sessions	Any	3	1	
Small Group Sessions (repeat)	Any		1	
Marking (assessment by one 100% Exam)	15			0.5 per student
Marking (where >1 assessment) **	15			1 per student **
Double Marking (i.e. full repeat marking)	15			1 per student
Marking ‡	30+			2 per student ‡
Double Marking (i.e. full repeat marking, including dissertations)	30+			2 per student
Dissertation Including Supervision/Marking	30			10 per dissertation
Dissertation Including Supervision/Marking	45/60			14 per dissertation
Moderation	Any			10 plus 1 per 80
Online Module	15/30	200/300 overall, or 100 for repeats in year		
Field Trip Modules	Any	Max 8 hrs delivery per day. Allocate 0.5hr per delivery hr, or 1.5hrs if new trip (lead only)		

† HoDs may add discretionary hours where large/complex teaching and marking teams are used.

* Determined by the Head of Department based on the development required. The same applies to Module Refresh.

** If MCQs are to be used a conversation with the HOD will be had to determine hours for that assessment.

‡ 2 per student should only be allocated where the volume of assessment requires, otherwise 1.

Academic Personal Tutoring and Placement Tutoring	
UG /PGT Students	3
PhD Mentor [<i>PhD Supervision & Mentoring SWARM line</i>]	3
Industrial Placement (WIE Tutors)	As calculated by WIE Director based on number, location, grouping, and complexity. Max 25.

Research, Scholarship and Support [*S&S in SWARM*]

The maximum research/scholarship allocation is 70% or 1155 hours, with the exception of when funding bodies stipulate a higher percentage of workload time. The 1155 includes:

- Research baseline allocation – 110/330/600 (see below)
- Research Outputs – max 400
- Impact Case Studies – max 200
- PhD supervision – max 300

The above allocations are to be finalised with the relevant HoD in consultation with the DPVC, ADR, and DoRI.

The E&R research baseline allowance of 330 (or 600 if under PDP) includes: 1. Independent research, knowledge exchange and impact development activity which leads to an external output or outcome (e.g., a publication/impact case study evidence); 2. Research administration/support and grant writing; 3. Leadership and skills development including conference attendance and training.

The E&S research baseline allowance of 110 includes 1. Development of educational materials (e.g textbooks, case studies, etc.); 2. Leadership and skills development including conference attendance and training.

Research and Scholarship	Hours
E&S Faculty (Scholarship) – baseline	110
E&R Faculty (Research) – baseline	330
E&R Faculty (Research) during first three years of being appointed as a Lecturer – baseline	600
+ Research Outputs (max 400) <ul style="list-style-type: none"> • Up to 400 hours additional to baseline to support staff who have REF eligible internationally excellent or world leading publications. See HoD Research Discretionary. 	400
+ Impact Engaged Research (max 200) <ul style="list-style-type: none"> • Up to 200 hours per project additional to baseline for developing excellent impact. See HoD Research Discretionary. 	200
+ Grants <ul style="list-style-type: none"> • Funded research based upon time costed in awards (agreed by HoD and DORI, involving the ADR where necessary). Note that maximum research allocation is 1155 hours. 	n/a
+ PGR supervision (max 180) – [<i>PhD Supervision & Mentoring SWARM line</i>] <ul style="list-style-type: none"> • Up to 72 hours per FTE student 	180

Research & Scholarship Time Explained

The School's approach to research time in workload planning is reflective of the discipline context. It is transparent to all members of the School and can differ at Department level, where appropriate.

Staff on E&R contracts will be allocated **20%** of their workload to internally-funded research time. Staff on E&S contracts will be allocated 7% of their workload allocation to internally funded scholarship time. This is referred to as the base-line allocation. This is split into the categories of:

For SLs and Ls

- Independent research, knowledge exchange and impact development activity which leads to an external output or outcome (e.g. a publication/impact case study evidence) **70% (E&R)**
- Research administration/support and grant writing **10% (E&R)**
- Development of educational materials (textbooks, case studies, etc.) **80% (E&S)**
- Leadership and skills development including conference attendance and training **20% (E&R and E&S)**

For APs and Ps

- Independent research, knowledge exchange and impact development activity which leads to an external output or outcome (e.g. a publication/impact case study evidence) **60% (E&R)**
- Research administration/support and grant writing **30% (E&R)**
- Development of educational materials (textbooks, case studies, etc.) **90% (E&S)**
- Leadership and skills development including conference attendance and training **10% (E&R and E&S)**

Staff involved on research grants will have time committed to research with an external sponsor included in their workload allocation.

Based on the Department context, the School has policies to reflect how grant-linked time may change the overall research allocation, as follows. **Where staff are involved with research grants, the School will consider the overall balance of research time, and will adjust the overall research time, accordingly. The maximum research/scholarship allocation is 70% or 1155 hours, with the exception of when funding bodies stipulate a higher percentage of workload time. No adjustment will be made for unfunded research time.**

Staff whose time is wholly covered by research grant/grants will not receive the base-line allocation.

Support	Hours
<p>Citizenship – Citizenship time is intended to allow staff to contribute to the successful management and delivery of their department’s strategic aims. This part of an academic role encompasses aspects of work not substantive enough to form a leadership role. The below list of inclusions is indicative and not exhaustive with staff and HoDs encouraged to use judgement if other activities are being discussed.</p> <ul style="list-style-type: none"> • Attendance at departmental seminars, employability events, graduation ceremonies, and internal examinations • Mandatory training such as Health and Safety and Information Governance • Open Days and other student recruitment events • Staff recruitment events (panels and presentations) • Widening Participation events • Writing references for current and past staff and students • Internal and external reviewing of papers and grant proposals • Journal editorships and editorial board memberships • Other administrative and ambassadorial duties. 	110
<p>Office Hours – Specific hours that staff are available to see tutees and other students. This should be 2 hours per week during term time.</p>	60
<p>Planned Long Term Leave – in accord with University & UEBS policy.</p>	As agreed with HoD
<p>Study Leave – in accord with University and UEBS policy.</p>	As agreed with HoD

Academic Professional Programme [*S&S in SWARM*]

Many academics new to Exeter will need to complete the Academic Professional Programme (APP). This is the successor programme to PCAP (Postgraduate Certificate in Academic Practice), and while the outcomes are the same, including HEA Fellowship, the APP programme is structured as a degree apprenticeship over an 18-month period (from Sept 2019) with start dates in September or March of each year.

There are two WAM allowances for APP. The first is for actual APP activity (classes, training, and assignments) and counts towards annual workload (285 in total over the APP period). The second allocation of 210 is mapped against existing workload that helps toward the completion of the apprenticeship; in short, it's learning a new skill, gaining knowledge, or putting either of these into practice for the first time. At least 100 of the 210 must be teaching or teaching-related activity, thereby supporting the HEA Fellowship aspect of the APP programme. All necessary guidance will be provided to APP participants by the APP team.

Academic Professional Programme (Degree Apprenticeship)	Hours
<p>Academic Professional Programme (20% OJT) – <i>taught element</i> 18-month programme: September start Year 1 – 243, Year 2 – 42 March start Year 1 – 119, Year 2 – 166 (2018-19, 24-month programme: Year 1 – 123, Year 2 – 162.) (Where APP is being taken without the degree apprenticeship the number of hours allocated may be slightly lower than 285 as there is no End Point Assessment requirement. There may also be those taking only part of the APP and so hours may be reduced. See ADE.)</p>	285
<p>APP: Teaching or Research Learning Activity (20% OJT) – <i>practice</i> 18-month programme: 210 activity over the period (2018-19+, 24-month programme: 371 activity over the period)</p>	0

Head of Department Discretionary Hours

Discretionary Allowances	Hours
<p>HoD Discretionary Hours – A HoD can provide hours at their discretion for activities that are not covered by the workload model but form part of a staff member's workload; hours provided should be representative of the activity being undertaken. A HoD must provide a reason for the allocation which will be recorded with the allocation in SWARM. Where a new role is agreed after the signoff of the WAM, this will be recorded as HoD discretionary hours along with the role title. This role will then be reviewed and may be added to the next WAM.</p> <p>HoDs can use the following three lines in SWARM to make allocations:</p> <ul style="list-style-type: none"> • HoD Research Discretionary • HoD Teaching & Assessment Discretionary • HoD Admin & Service Discretionary 	As agreed with HoD

Degree Apprenticeships [*S&S in SWARM*]

As our Degree Apprenticeship portfolio and approach has matured, we're aligning the preparation, delivery and associated marking with our normal teaching workload allocations from 2024-25. This said, we still need to acknowledge that flexibility and pragmatism are likely to be required in arriving at appropriate time allocations for DA work, especially where multiple cohorts exist for a module over the year.

Development, Teaching & Management of Degree Apprenticeships	Hours
Module Convener (where multiple cohorts led by a team)	50
Mentors	25 per student (assumes a max of 50 students per mentor)

Executive Education

Executive education will be recognised in SWARM hours if this is possible (for example where open programmes are recurring or long running custom programmes can be planned sufficiently in advance). If these conditions do not apply, additional remuneration may be paid. For full-time staff, a maximum of 165 delivery hours per year will be eligible for additional remuneration (10% of E&R SWARM hours). Individual academics with strong research franchises and reputation in executive education might justify a higher allowance but this must be agreed by the Dean and relevant HoD to allow effective overall workload management.

Additional remuneration will only be paid when the individual's SWARM allocation of teaching, research and administration activities is fully taken up and achievement of relevant PDR objectives is on-track.

Additional remuneration will only be paid when the relevant programme can secure at least full cost recovery, after taking all direct costs including all remuneration into account.

Additional remuneration will not be paid when there is no external revenue associated with the programme (for example for training delivered within the University).

When SWARM hours are allocated to Executive Education activity, the deliverer will not receive any additional remuneration. When SWARM hours are allocated, an indicative exchange rate of 3:1 (SWARM hours: Executive Education delivery hours) will apply, this may be amended on a programme specific basis by agreement between the HoD and the ADBEI.

Administrative Roles [*Non-Leadership Roles – S&S in SWARM*]

These are roles generally found only in the Business School, and are recorded in SWARM under the S&S category.

Administrative Roles	Max Hours	Multiplier (if applies)	Notes
Academic undertaking PhD/DBA/EdD Study	80		E&S only
Accreditation and Rankings Lead	500		
Advanced Teaching Practitioner(ATP)	200		
Chief Diversity Officer	500		
Chief Sustainability Officer	TBC		
Climate Advocate	165		
Department Subject Leads (Economics)	495		
Director of Digital Learning	500		
Economics Scholars Coordinator	100		
External Partnership - Exeter College	35		
Financial Database Coordinator	450		
International Recruitment (for those not Programme Directors, or DoGs)	20-200		Up to 200 hours
INTO Liaison Officer	150		
PRME Lead	100		
Programme Development	200		
Research Environment Lead	320		
Staff Seminar Series	100		
WIE Programme Tutor and Portfolio	-		Variable

Leadership Roles [*Administration & Other Roles in SWARM*]

These are roles found across the University, and are recorded in a specific manner in SWARM. The separation of Administrative and Leadership roles is a convenience for SWARM, and the result of attempts at harmonisation across the University in role titles. We have necessarily had to adapt the pre-set Leadership roles so that they fit the circumstances of the Business School.

Leadership Role	Max Hours (if applies)	Multiplier	Notes
Academic Lead for Student Support (Racial Equality and Inclusion)	165		
Academic Conduct Officer	100-200		HoD decide
Aspire Mentor	30		
Associate Dean of College (Education) ADE †	1280		ADE
Associate Dean of College (Education) ADE †	800		AD Business Engagement, Innovation and Professional Education
Associate Dean of College (Research) ADR †	800		
Associate Dean of College (Global) ADG & Masters †	1280		Associate Dean Masters
Athena SWAN Lead	400		
Centre/Institute Director (and Co / Deputy Directors)	200		Up to 200 hours per centre.
Chair of Ethics	300		
Chair of Mitigation Committee	50		
Deputy Director of Academic Misconduct, Assessment and Mitigation	75		
Deputy Head of Department	500		Mgt and F&A §
Deputy Programme Director	150		Up to 150 hours
Deputy PVC and Dean	1320		
Director of Academic Misconduct, Assessment and Mitigation (Formerly known as SAMO)	200		
Director of Doctoral Studies	500		
Director of Education and Student Experience	640		Departmental role
Director of Equality, Diversity & Inclusivity	330		Departmental role
Director of Exams and Assessment	30		Departmental role
Director of Impact	320		
Director of Research (DoRI)	640		Departmental role
Disability Officer	80		
Ethics Officer	60		Departmental role
FCH Coordinator and Accreditation Officer	50		
Head of Department	1000		
Key Programme Director	500		Key <i>FT</i> Ranking Programmes
Lead Academic Tutor	150		
PGR Coordinator (Departmental)	200		

Programme Director	400		Up to 400 hours, HoD to determine within guiding framework of max 200 for <60 students, max 300 for <200, and max 400 for >200
Programme Director	400		Four Year Programmes (WIE, WYA)
Senate Member	20		
REF UoA Lead	320		Up to 800 nearer the REF
Research Lead – Management sub-depts.	150		
Senior Tutor	50		Departmental role
UCU Rep	100		
Vice Chair of Ethics	170		
Widening Participation Officer	100		Departmental role

‡ Our Associate Dean roles are still referred to as College roles in SWARM, hence the titles here.

§ This is the default for Deputy Head in Management and Finance & Accounting, but can be adapted in agreement with the Dean depending upon nature of role and size of sub-department.

Changes to the WAM in Recent Years

Summary of Changes in the 2024-25 WAM

For 2024-25 we've made only minor changes so as to reflect current practice and resolve some anomalies.

The specific changes made for this 2024-25 WAM were:

- ACO and SACO allocations increased to reflect the increasing complexity of this work. ACO was 50, and SACO was 150.
- Programme Director was up to 200. Now can be up to 400, with HoD determining appropriate allocation. Assumes max 200 for <60 students, max 300 for <200 students, max 400 for >200 students. WAM removes separate previous line for DA programme directors at 300.
- Moderation, was 10 plus 1 per 80, and this has been increased to 10 plus 1 per 50.
- Field trips have been added to the teaching section.
- New module development max reduced from 400 to 300.
- Added line for Online module delivery as an inclusive figure for all activity.
- Department Ethics Officers are actually multiple roles, and reduced from 150 to 60
- Chair of Ethics increased from 250 to 300.
- Director of Research Environment from 500 to 320 (0.2fte).
- Director of Impact revised from 300 to 320 (0.2fte).
- REF UoA Coordinator 320, increasing to 800 nearer the REF.

- Departmental PGR Coordinators were 100 with 4 per student, but for simplicity we change this to a flat figure of 200.
- Removed PGR Careers Officer as role not used.
- Removed the separate line for DA staff office hours as no longer used in allocations.
- The Executive Education text has been revised to align with associated Executive Education policies.
- Marking / Assessment preparation time is just included in an expanded allowance for module leadership.
- Marking on 30+ credit modules was allocated 2 hours per student, but as the volume of assessment is being reduced so the allocation should be in proportion to the marking volume required, and not the credit weight. Hence 2 can only be allocated where warranted by there being usually more than two assessments.
- Removal of separate Workload Governance Group, as the management of workload and the WAM is now more correctly owned by the School Leadership Team.

Summary of Changes in the 2023-24 WAM

For 2023-24 we've made only minor changes so as to reflect current practice. As noted at the start of the document, a Faculty process will determine the scale, scope and process for revisions for 2024-25.

The specific changes made for this 2023-24 WAM were:

- Inclusion of wording on allocations for Distinguished Research Professors and Professors of Practice.
- Removal of Covid provisions.
- Clarification of allowances for the development of new modules.
- Revision to section on professional education in light of a separate recent UEBS policy document.
- Revision to language and correction of typos and other minor errors.
- Inclusion of roles created since WAM last revised.
- Clarification of the policy on Executive Education (referred to Professional Education in previous versions of the WAM).

Summary of Changes in the 2022-23 WAM

The WAM document has been rewritten to incorporate the changes agreed at the Workload Planning Steering Group (WLPSG) which have been documented here for academic staff reference: <http://www.exeter.ac.uk/ppbi/workloadplanningteam/colleges/>

The key changes include:

- Removal of the PVC Role
- Change of ADE Professional Education to AD Business Engagement Innovation and Professional Education
- Removal of ADE Masters
- Change of ADG to AD Global and Masters
- Director of Education role changed to Director of Education and Student Experience (DESE)
- Hours for DESE up to 640 max
- Hours for DoR up to 640 max
- Added Accreditation and Rankings Lead

- Added Research Environment Lead

Summary of Changes in the 2021-22 WAM

The WAM document has been rewritten to incorporate the changes agreed at the Workload Planning Steering Group (WLPSG) which have been documented here for academic staff reference: <http://www.exeter.ac.uk/ppbi/workloadplanningteam/colleges/>

The key changes include:

- Citizenship hours increased to 110.
- Baseline Research Changed
- INTO Liaison Officer reduced to 150 hours
- Associate Academic Dean of Students has been removed
- Academic Lead for Student Support (Racial Equality and Inclusion)
- Tutor hours has been increased to 3 hours per student
- Library Officer Role has been eliminated.
- PGR Careers Officer added
- Module Lead hours have been increased
- Module Refresh hours have been added
- Delivery Preparations have been increased to 3 from 2.
- Key Programme Director – Degree Apprenticeship has been removed from S&S as this role is covered under Head of Department
- Chief Diversity Officer has been added under S&S Admin Roles with hours agreed with DPVC
- PVC role increased to 1650 hours
- ADG and ADR roles adjusted to 800 hours
- DOI role adjusted to 300 hours
- Supervision hours for PGR students increased, and cap decreased
- Calibration of DA hours

Workload Governance

The governance of the School's WAM is managed through the Senior Leadership Team. Each year SLT will determine the process for reviewing and confirming the WAM based upon changes being driven at University and Faculty levels. SLT is also responsible for reviewing total workload allocations during the year to ensure consideration is being given to the equitable distribution of work and staff wellbeing.

UEBS_ Workload Allocation Model_2024-25_FINAL 1.0

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Contact us

University of Exeter Business School
Rennes Drive
Exeter
EX4 4PU

Tel: +44 (0) 1392 725269
Fax: +44 (0) 1392 723242



University of Exeter
Business School