RESEARCH AND DEVELOPMENT SERIES

The Management of Academic Workloads:
Improving Practice in the Sector

Final Report

Peter Barrett and Lucinda Barrett
University of Salford

September 2009

Leadership Foundation
for Higher Education

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CONTENTS

LIST OF FIGURES

LIST OF TABLES

EXECUTIVE SUMMARY

This report draws from the work undertaken by a community of university partners, drawing from their different perspectives on issues connected to the management of academic workloads (MAW). The aim has been to support the implementation of improvements, and also to disseminate the resulting good practices more widely to the academic community. MAW is an issue in which many universities are becoming increasingly interested. This appears to be driven by diverse factors, including the need to use human resources effectively, whilst also meeting university objectives on staff welfare in line with health and safety targets. However one of the strongest factors is the unifying belief in the need to maximise the equitable and transparent spread of loads across academic staff. This report reflects the diverse experiences of the university partners, but the following common issues can be highlighted:

- A wide range of potential benefits for all stakeholders have been identified, if MAW practice can be improved, however, there are also significant obstacles to change to be mapped and negotiated before those benefits can be realised.
- Most universities have some sort of MAW policy, but in many of these cases it does not really impact on practice within schools[1]. The suggested scope of enhanced policies is given and a range of possible levels of central engagement suggested. It is not assumed that a monolithic approach is optimal in every case and the value and potential dangers of transparency are highlighted.
- The notion of a university framework model is set out. This takes the "what" of the policy and provides "how" parameters, but at a carefully chosen level of detail. Institutional consistency can then be complemented by local autonomy that allows decisions to be made based on a close knowledge of the people and activities involved.
- Experience of the implementation of improvements in MAW across an institution has shown that this activity works in cycles of development, not in a linear path. As result it is typically a complex, medium term (5 years) endeavour that must then remain vibrant and dynamic in the long term. It has to address, in concert, technical and social issues and models are provided to exemplify

this together with prompt questions. Action can start locally in schools or at university level, but will have to progressively engage at both levels to succeed.
- Information made available through MAW processes can assist with other university goals, in areas such as: equality and health and safety. Further, by linking workload data to financial data, information for activity costing and TRAC (Transparent Approach to Costing) can be created. So, whilst MAW processes cannot directly reduce absolute workload levels, they can support improved planning so leading to more effective and sustainable working.
- Clear recommendations are made for various stakeholders, in summary:
  - Universities should create consensual agreed policies for MAW, centred on equity, and these policies may be actively implemented using the notion of framework models. The overview provided by this may then be used to address related issues such as equality and health and safety.
  - Heads of school do not have to wait for an institutional initiative, they can start things locally, but should pay at least as much attention to achieving consensual agreements, as to creating a technical model.
  - Staff and unions should actively engage in the development of equity-orientated MAW systems and, where they are achieved, then perhaps the issue of more flexibility in contracts could be approached with greater confidence.
  - The HE funding councils have the opportunity to provide a positive stimulus to MAW approaches that link robustly to university financial management systems, by encouraging the use of MAW data to support TRAC reporting.
  - Bodies like the Health and Safety Executive (HSE) and Equality Challenge Unit (ECU), that require institutions to take an overview of their performance around specific issues, see potential in MAW data informing matters and this deserves to be explored further.

Balancing academic workloads more equitably and in such a way that it supports the alignment of individual aspirations

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[1] In this report "school" is used as a synonym for department

and institutional imperatives is a fast developing field. It is being driven by ever increasing pressures on the sector, but efforts to address improvements in the approaches and systems used have to avoid simply compounding these pressures by imposing additional demands on managers and staff. The MAW partnership has been exploring ways of making progress that support improvements, but are orientated towards creating effective and consensual solutions built on integrity and trust. The MAW network activity is "work in progress", however, it is hoped that you find the learning shared in this report helpful.

1 INTRODUCTION

The issue of the management of academic workloads (MAW) is something that many universities are reviewing and more formal mechanisms for allocating work, using for example metrics recorded in spreadsheets, seem to be becoming more widespread. The impetus for this seems to be a response to pressures within the sector to use resources more effectively. Allocating work more equitably and transparently can also assist with staff welfare issues. For example, well-managed systems can assist in meeting other university target outcomes, such as the Health and Safety Executive's recommendations in reducing the incidence of stress related illnesses, and also in relation to equality challenges. However whilst MAW may help with the relative balance of workloads, help to promote equity and highlight areas where resources and demands are not in balance, it cannot resolve issues around absolute loads.

Earlier work (Barrett and Barrett, 2007a) drawing from interviews in nine universities, found great diversity in approaches to workload allocation within and between universities and provided a broad categorisation of them. This ranged from informal methods of allocation to comprehensive models that used metrics to balance across all work areas. This study also highlighted problems surrounding equity, such as in relation to the distribution of administrative tasks, scaling of marking and assessment loads and the omission of research in the calculations. Another commonly accepted theme was that a few staff in each school operate at the wide extremes of the allocation range. Although, objective equity is illusive there are practices that are patently unfair. Efforts can be made to address these deficiencies and, through increased transparency and consultation, academics' understanding and perception of equity can be greatly enhanced.

The current project has involved a network of twelve universities spread across the UK, which differ widely in their size, grouping and experience of workload allocation. Initial impetus for activity in this area can also be seen to be split, almost equally, between those that have started at school level and those partners that have initiated activity at central university level, often as a strategic leadership decision. Through partnership discussion and by examining case studies, both within the project and from other projects, some initial points can be made. Firstly the process of introducing more formal mechanisms to allocate work, which may operate within some university policy, can take around five years. This reflects another finding that suggests that the process is not a linear path of initiation, development and maintenance, but rather involves cycles of activity that occur across university organisational levels, involving consultation and negotiation between the various stakeholders. Lastly this process involves a dynamic interaction between the technical aspects, such as the development of a model that can balance all the work roles, and the social processes of consultation. The latter are central both to the development of any model and to the ongoing process of implementation through the actual allocation and balancing of workloads within a given school.

Although the introduction of new systems to manage workloads can be in itself resource intensive at the outset, there are many advantages to all the stakeholders that good practice can offer This report will cover specific topics, starting with the benefits for the different stakeholders in relation to influence on agreements, information gained on workloads, and improvements in outcomes for each stakeholder group. It then goes on to look at policy aspects, and then to issues to be considered in the choices of models that might be used. Two cases studies are then used to illustrate the different patterns of development activity that can occur across the organisational levels. It includes a checklist of questions, inspired by the Equality Challenge Unit's approach, so that an assessment can be made of the various elements, whatever starting point is chosen. The management of academic workloads can also articulate with a number of other university processes and a section follows showing its potential contribution to meeting universities requirements in areas such as health and safety and equality and diversity legislation and also in providing information for activity costing.

2 BENEFITS OF MAW FOR STAKEHOLDERS

The improved management of academic workloads (MAW) has various sorts of benefits for the different stakeholders. This ranges from influence on agreements made as a result of consultation processes, greater awareness of workload issues and more equitable outcomes in the work allocated, with the benefits this can bring in terms of staff welfare. From another perspective MAW systems can help bring greater clarity about resources that can assist with their planning and management at different organisational levels. The main benefits are summarised in Tables 1 and 2

below from the points of view of the key actors, namely, academic staff and Heads of School (HoS). The staff benefits are seen to be of considerable value to the HoS as well, but the second table sets out additional benefits for the Head in particular. Benefits for other stakeholders are outlined in the subsequent sections. The final section addresses the issue that, despite these potential benefits, there will always be problems in making any changes.

2.1 BENEFITS FOR ACADEMIC STAFF AND HEADS OF SCHOOL

TABLE 1

POTENTIAL BENEFITS OF MAW FOR ACADEMIC STAFF	
FACTOR	**ACADEMIC STAFF BENEFITS**
Influence / agreements	Involvement in consultation processes on university wide guidance and principles.
	Motivational benefits from transparent discussion at school level of the MAW model and from opportunities to affect the development/evolution of the system.
	Opportunity to influence the use of the model to change allocation of school resources, such as on patterns and distribution of work at times of peak demand.
	Scope to formally discuss the balance of own activities in a work plan with HoS/ Subject Group Leader/ work planner.
Information	Greater awareness of overall workload situation and average loads.
	Use of school forums on workload balancing to discuss school plans at the operational level.
	On University wide guidance and principles.
	Documentary evidence of workload.
	On compliance with any contractual agreements on workloads.
General outcomes	Improvements in equity as range of workloads across schools become nearer the median.
	Integration of all allocated work areas into the assessment on workloads.
	Knowledge that situation can be reviewed to check for equity of outcomes.
	Benefits from consistent and transparent university system for monitoring fairness and equality and diversity issues.
	By encouraging work planning, to explicitly prioritise activities and to help maintain work life balance and avoid undue work related stress.
	Encouragement to engage proactively with work balancing issues.
Planning outcomes	Clear timescales for the MAW planning process identified to facilitate staff MAW work plans. This will help staff to explicitly prioritise activities and help to maintain work-life balance.
	Facility to link work planning discussion to the appraisal/review process and to integrate this to career progression plan.

TABLE 2

POTENTIAL BENEFITS OF MAW FOR HEADS OF SCHOOL

FACTOR	ADDITIONAL HOS BENEFITS
Influence / agreements	For post 1992 universities, the ability to use the model to show that contractual details on hours are upheld.
	Through consultation within the school on the model, an increased awareness of the sensitivities and issues affecting staff.
	Through enhanced consultations with staff members gaining greater knowledge of their workloads, expertise and preferences.
	Agreements on a workable/acceptable level of detail for ease of use.
	Agreement and identification of a reasonable load to assist in the monitoring of resources.
	Assurance of agreed process and principles.
	Reduction in the time spent on disputes and queries in relation to workloads due to agreed, defensible and transparent process.
	Reliable evidence of allocated workloads facilitates open discussions on issues such as overtime and consultancy.
	Leadership support in addressing the issue systematically and consistently to achieve agreed objectives.
Information	Information from the model on resources, indicating for example general resource shortfalls and more specific areas of over or under loading.
	Documentary evidence of defensible process to counter any claims of unfairness in process or outcomes.
	Continuity of practice facilitated for new heads of school and subject group leaders.
	Provision of information that can be used in the performance management and review process.
	Potential to use data to inform TRAC Staff Transparency returns.
General outcomes	Local discretion to adapt/create the details of the model to suit their discipline within universally agreed framework of principles.
	Encouragement, with staff, to innovate and think flexibly about the delivery of teaching etc.
	Potential to capture the complexity of workloads through the use of supportive software.
	Through periodic review, a dynamic system that can respond to contextual change.
Planning outcomes	Tool to plan, manage and monitor resources for all activities.
	Greater awareness of unit costs of module provision.
	Tool to assist in the strategic and integrated planning for school in the appropriate and sustainable allocation of resources.
	Assistance in planning of longer term aspects, such as the provision of sabbaticals and general workforce planning.
	A clear system and transparent system for school administrative staff and ease of availability of data.

2.2 BENEFITS FOR DEANS

- Source of management information to provide greater knowledge of allocation of resources across schools within a faculty.
- Facility to articulate with other university wide planning systems at faculty level.
- Facilitating assessment of the background for school budget deficits/surpluses through common model and measurement units
- Reduction in grievance procedures due to agreed and transparent principles and processes that enable MAW outcomes to be assessed and compared on a consistent basis.
- Facilitating the alignment of the balance of activities/resources with the faculty strategic plan
- Improved relationships with heads of school, subject group leaders, staff and staff representatives as a result of drive to improve equity and transparency through the consultation and development of MAW principles and processes.

2.3 BENEFITS FOR UNIONS

- Consultation process on workload balancing systems that allow staff interests to be properly considered and acted upon.
- More equitable workloads for staff
- Clear and consistent evidence that helps judgements to be made when disputes arise, including issues of equality and diversity.
- Agreed principles on MAW processes and systems that work to facilitate more equitable workloads for all staff, taking account of all the main work activities and bases of employment.
- Transparency in all the MAW processes and outcomes.
- Avoidance of 'precision accounting' mechanisms that can undermine academic freedoms.
- Local agreement (s) on what is considered a reasonable load to allow for relative assessment of staff loads and a better appreciation of absolute loads.
- Reduction in time commitments of union officers in avoidable disputes arising from unsatisfactory MAW policies and processes.

2.4 BENEFITS AT UNIVERSITY LEVEL

Executive Group

- Consensual resolution of the diverse views on workload balancing issues, including the justice of process and outcomes and the implications for practice.
- Assurance of improved equity for staff in MAW plans

and evidence that suitable processes have been followed to ensure that legal obligations are met in relation to equality legislation and Health and Safety directives.

- Reassurance that MAW systems are in operation to ensure that undue work related stress is minimised and work life balance upheld.

Human Resources

- Clear policy to assess that procedures are operating consistently within schools
- Facility to use MAW data to monitor for individuals consistently above school averages on workloads or above contractual limits.
- Agreements reached through extensive consultations on MAW objectives, leading to clear agreed and transparent processes may help improve employee relations and reduce the number of disputes.
- Consistency and reliability of data on staff time allocations improved.
- Facility to integrate system with others such as staff appraisal, TRAC etc

University Finance / Planning departments

- Aggregate resource and work planning information for staff time available from subject group to university level.
- Facility to respond efficiently to TRAC staff returns
- Facility to support Hefce TRAC T and R returns and university costing systems effectively and efficiently.
- Facilitates assessment of viability of academic units.
- Consistency and reliability of data on allocations of staff time improved
- Data on staff hours of taught modules delivery supports development of interschool/interfaculty transfer charges from modules provided to other schools/faculties

2.5 BENEFITS FOR STUDENTS

- Improved consistency in module resources through identification of inequalities of resource allocation to modules.
- Improvements in consistency of support and responsiveness of staff owing to fairer distribution of teaching loads e.g. improving lecturing staff welfare/stress levels.
- Where MAW is used to clarify roles and responsibilities of module, course and programme tutors, the responsiveness and reliability of student support should be improved.

2.6 BENEFITS FOR FUNDING BODIES

One of the aims of UK higher education funding bodies is to ensure that universities develop suitable systems to support effective institutional management. The development of a university wide MAW system supports this aim.

2.7 CLARIFICATION OF POTENTIAL PROBLEMS

Despite the advantages suggested above there are many potential problems involved in introducing or changing a system for allocating work, at a general level there is often a natural resistance to, and suspicion of, change from staff, many of whom will have tuned their workloads over several years. Other issues will depend very much on the context of the university, but include lack of leadership or resources to

facilitate the process and hostility to overly complex models. A useful scoping exercise for stakeholder groups within a university can be to first identify together the main restraining forces or problems seen in relation to MAW and then to look also at the aspects that could drive change, with a view to identifying actions that would address the problems by building from the driving forces. This approach builds from Kurt Lewin's (1947) forcefield perspective that the status quo is the outcome of a quasi-stationary equilibrium that can be shifted by increasing driving forces or reducing the restraining forces. This exercise stresses the identification of consensual actions to bring this about. Figure 1 gives a generic example of this type of activity carried out by the MAW group partnership.

FIGURE 1

AN EXAMPLE SHOWN THROUGH A FORCE FIELD ANALYSIS
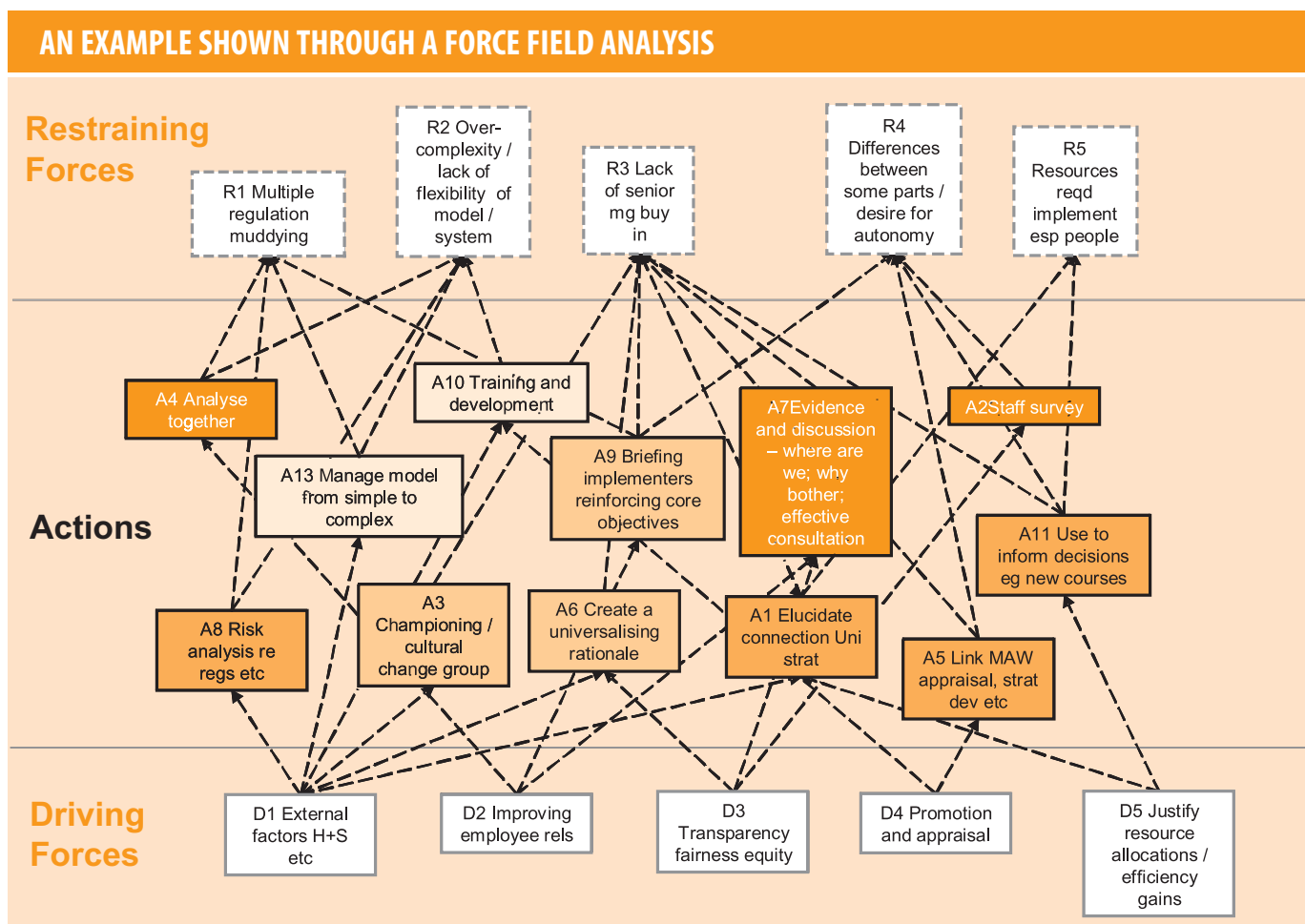
Summary key for Actions
- Inclusive consultation (A2, A4, A7)
- Creating and maintaining a strategic rationale (A3, A9, A12)
- Simplicity of operation (A10, A13)
- Link to university strategy and other university processes (A1, A5, A8, A11

3 ENHANCING UNIVERSITY POLICY
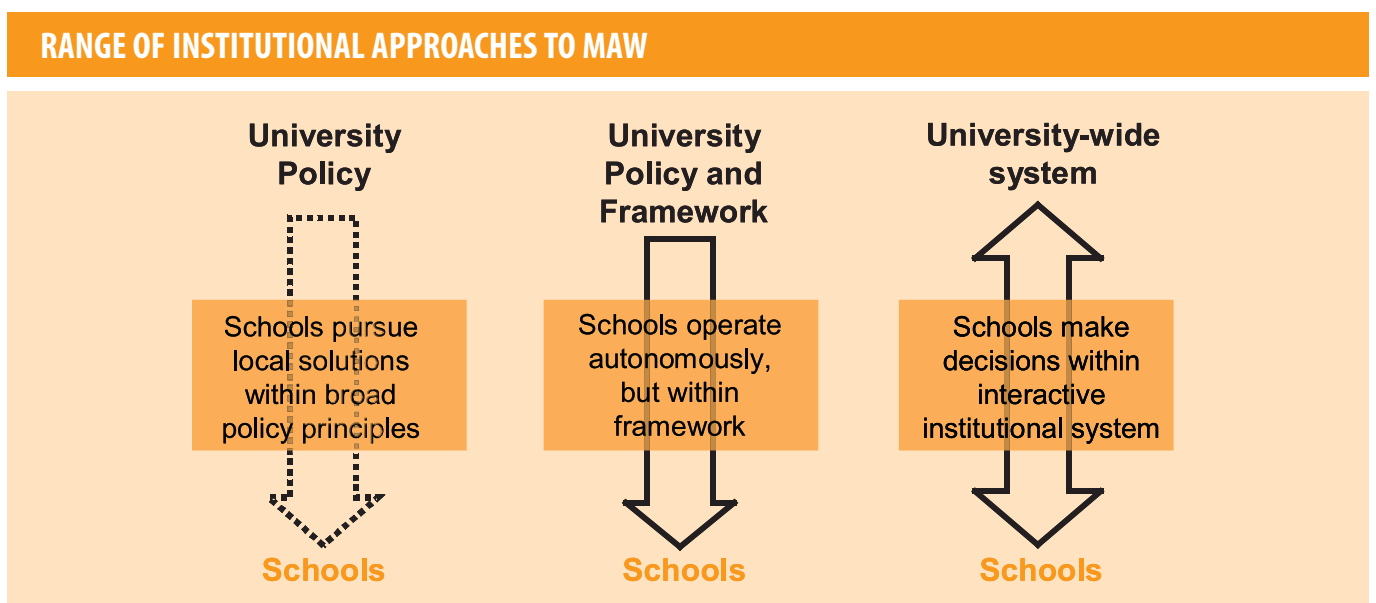
3.1 CONTEXT

Trends towards increasing the size of academic units have made the management of academic work more complex. Further, restructuring and amalgamations, within and between institutions, have tended to increase the diversity of practices within institutions and heightened awareness of disparities in workloads. This complexity has been compounded in many schools by the rise of team teaching. Differences in emphasis found within policies (referred to by some as codes of practice) also reflect the contextual differences of the universities. For example within the post 1992 group of universities employment contracts that specify weekly and annual maxima for formal scheduled contact teaching have created a legacy of embedded practices that need to be considered within any policy and resulting model. In other universities a strong institutional research agenda can require a more explicit assessment of the research aspect of workloads, and there can be resulting tensions between teaching and research. It is quite common within a given university for there to be imbalances between faculties with research portfolios at different levels of maturity. Within all of this the union interest in academic workload management varies between institutions and the impetus for activity may come from unions, management or from within schools themselves. Despite these differences in emphases, evident across the university partners studied, there was wide agreement on the essential elements that should make up the rationale / purpose behind institutional policies for academic

workloads, that is, to achieve a more equitable division of agreed workloads and to make the most effective use of human resources.

In the first instance the formation of a university policy involves developing agreements between the different interest groups, for example: managers, academic staff and unions. Improving equity has been found to be a commonly agreed aim, and this can help to focus the discussion between the parties. For example, large differences in allocations can work as a driver for change. Some universities decide that a policy with a set of overarching principles is sufficient for them; others choose to provide a more detailed framework model for allocating work (see section 4 below); and a few have gone on to provide an integrated system across the whole university (see Figure 2). However, whilst there may be a desire for consistency across the university this does not mean conformity / standardisation, as it seems important that any university framework model can be adapted through consultation to fit school needs and allow ownership at this level. Wide dissemination of the policy, including induction and training for staff involved in managing workloads is essential, as is periodic review of policy and process at university and unit level.

In some universities activity to enhance MAW processes is not led from university level but is initiated within schools. In these cases the process of gaining consistency occurs gradually, working within, then across faculties, and using pilot studies to build experience. The Head of school/

FIGURE 2

RANGE OF INSTITUTIONAL APPROACHES TO MAW

University Policy	University Policy and Framework	University-wide system
Schools pursue local solutions within broad policy principles	Schools operate autonomously, but within framework	Schools make decisions within interactive institutional system
Schools	**Schools**	**Schools**

department is usually the lead in gaining local consensus, but actual allocation/division of tasks may be delegated to subject teams. No matter where the process is initiated, confidentiality and sensitivity are essential in development/consultation process.

3.2 DETAILING THE POLICY

Although many universities have a policy statement about workload balancing it is very common for this to be divorced from practical operations. To overcome this firstly the policy principles need to infuse an implementation process across all the organisational levels. This might stress that any process aims to achieve the transparent and equitable distribution of work, which is balanced over a given period and built from agreed defensible principles, that can reduce disputes over workloads and encourage effective use of human resources. It should also encourage consistency through the identification and agreement of a reasonable or normal load and the strands of activity to be included. It will also detail which staff are covered by the process and how any model used will accommodate flexibly staff on fractional or hourly paid contracts. Further decisions are needed on the locus of responsibility for workload management activity e.g. school or faculty and for the review of process outcomes. Statements should also be made on the transparency of the method used and on the outcomes of the process. This could include more detail, such as on how transparency is defined, for example if allocations are published across schools, or if staff are given their own data in relation to school average allocations. It might be that a staged process for transparency could be adopted to smooth through a transition period before full transparency of data occurs.

Within the detail guidelines might be given on the timescales for the process, such as when first indications for allocations will be made and also more broadly how the system articulates with other processes such as appraisal and planning and monitoring of resources to maximise effectiveness. If the university, in striving for consistency, has chosen to provide a framework model (see section 4) that can be adapted to suit school needs, then more detail will be needed on areas such as: the common units to be used, advice on the normal ranges for given roles and the degree of flexibility to adapt the model. If local data is to be collected together centrally then information will also need to be given on aspects such as timescales for data collections. A policy should cover the overall agreements to, and ownership of, the processes at all levels, covering both union and management interests. It can be a challenge to reach consensus between staff and managers, however a common focus on equity provides a robust basis from which to work. The policy might also include information on staff training provision for all those involved in allocating workloads.

More generally the policy should be considering how to enhance the quality of work done through matching organisational needs with individual capabilities and needs. This can extend, for example, to advising on reduced loads for probationary staff and on how staff development activities are accounted for within the model. It should work to help staff maintain the work / life balance and avoid undue work related stress, whilst using resources responsively to students needs. A policy needs to address the equality and diversity aspect of ensuring that allocations are free from discriminatory effects, for example the balance of work opportunities for part time workers, including the issue of teaching preparation time for hourly paid workers. This can be supported by a periodic equal opportunities audit. The policy should also include information on other checks, such as on how individual allocations that regularly and significantly exceed average loads will be detected and on any appeals process. The potential should be explored to utilise this data to inform wider issues such as: health and safety, equality, TRAC / activity costing (see Section 6).

3.3 MEASURING WORKLOADS

Within the context of the above the following aspects will have to be carefully considered, especially if some form of university wide approach is to be used.
The issue of the choice of a unit of measure should be considered taking into account various issues. Using contact hours, possibly supplemented by preparation time, marking allowance etc (input measures) to represent the actual work done is easy to understand, but may create a 'bean counting culture'. A move to "workload units" based on outputs, such as credits delivered to x number of students, may help to avoid problems of defining the size of task and encourage flexibility, but can seem detached from 'real' time. There is also a danger of quibbles if the approach is too detailed, covering all the fine elements of work with each task given an allocation. To avoid this a reasonable level of accounting should be agreed upon, and to allow for ease of administration an extra percentage (say 10%) can be given to cover any small tasks.

If a model is to be used to balance individual workloads equitably then it is vital that the policy states that the approach will be comprehensive in nature and include all the main work types, including research. The balance of resources between research and teaching can be an issue, as can the problem of incorporating research into already 'full' workloads. This is especially relevant where contracts of employment specify hours for formal scheduled teaching in the post 1992 group of universities. Further the policy could state how the differences in size of task might be assessed, such as weighting for the differences in assessment load for classes of different sizes.

More technical detail of measuring workloads is provided in Sections 4.2 and 4.5 below.

3.4 TRANSPARENCY

This issue is dealt with throughout the document as it is pivotal to many aspects of MAW, however it is of such importance that it deserves to be dealt with separately also. The transparency of operations is felt by many to be pivotal to any system of allocating work, and it can be seen as a driver for improving the equitable spread of loads and promoting accountable allocation methods. It can work to ensure that staff are reassured about the allocation process and can help the allocator (head of school or subject group leader) with visible, and hopefully defensible, outcomes.

However the word 'transparency' can be interpreted in different ways. For some it means an open account of all decisions, transactions and outcomes with, for example, individuals' named allocations published. Another interpretation will allow this information to be available only to a small group such as a subject group. Another approach to 'transparency' is to see its operation involving a summary record of allocation with perhaps a school average indicated, where individuals can only see their own data. Another issue is to what the word 'transparency' refers. For many transparency of outcomes is not sufficient, it is the decision-making processes behind these decision that is also important, for example, why a certain person is given a particular role.

Transparency itself is not a panacea. It will cause problems where systems are not operating in an equitable way. Further, at times HoS will want to use their discretion over publishing staff data, for example during periods of sickness. Although transparency can be seen as a stimulus for change, it seems that a staged approach to it can be helpful when methods are in transition or where the climate is conflictual. For example moving from a position where staff see their own data against overall allocations, to a time when all allocations are named and published. This approach can also be used over a normal yearly cycle where staff are given an early indication of their own allocations and later in the year, once consultations have concluded, an open document can be made available. However if this approach is taken it seems important that there is an agreed timescale.

4 BUILDING FRAMEWORK MODELS

The focus of this section is on the development of a framework model that supports the implementation of policy across the university, although many aspects are also applicable to the development of a model locally in an academic unit. For example university and school developments require attention to both the social consultative aspects and the technical dimensions of building a workload-balancing model. For ease of discussion these two aspects, the social and the technical, will be considered separately, but in practice these two elements work in a dynamic relationship. The process of developing a framework is commonly described as operating in three broad phases of initiation, development and maintenance. However case study work (Barrett and Barrett, 2009) has shown that these phases do not occur as a linear process, but rather unfold across the different organisational levels in a cyclical fashion, encouraged or restrained by resources provision (see section 5 below).

4.1 SOCIAL DIMENSIONS

4.1.1 Initiation
The impetus for the process will drive its development and may come from diverse sources, such as: inequitable practices leading to ill feeling and disputes. Another important driver will be the need to manage resources to ensure their appropriate and sustainable allocation within a given strategic framework. Other factors include the health and safety aspect of unmanaged workloads and work-life balance and from equality issues such as for fractional staff and their balance of work.

Sometimes the development occurs through an organic process, working from the school level up and is taken up gradually in other areas across the university. For others the involvement/support starts centrally with an initial broad policy and works towards an agreement on a framework and process for recording activities. However for wider dissemination of the process it is vital to have leadership at the highest level to ensure all the different university parties are engaged. The choice of the person with practical responsibility for the project development is pivotal, relying on a mixture of personal traits, and experience to ensure trust amongst those involved.

At this stage decisions are made about who is engaged in the process as part of a core working group and whom they should consult. Consultation can work through a variety of forums, such as faculty level, within subject groups, union and executive group. Confidentiality issues will need to be addressed within the consultation process and the forum for decision-making and endorsement will be set.

To take the initiative further, action is needed to create wider engagement with appropriate emphases on the benefits that the process can bring. Different parties will align to different aspects, such as the prospect of enhancing equality and transparency in processes, or the focus on the management of resources / performance. However, if management lead the initiation phase with an 'improve efficiency' objective, unions are likely to react adversely to the development of a framework. The challenge is in uniting these mixed, although not incompatible, agendas. Within all this there will be sector differences reflecting the differing contexts under which workloads have been managed.

These differences may result in varying emphases in the types of model created. For example those that look at inputs into a model formed by contractual agreements that must be met, such as on contact hours, compared with those that look at outputs, such as student numbers or research papers published. However such a polarisation is not inevitable, as many models exist that accommodate contractual agreements, whilst balancing within that around output dimensions.

A unifying approach can be to focus discussions around the creation of agreement centring on broad principles, such as transparency, and facilitating a fairer distribution of work. This can then lead to a build up of the detail, such as what is included and how to account for it, all operating within any academic contractual agreements, national or local. It is important also that the framework model remains flexible so that it can respond and adapt to contextual change. Another issue is the extent to which the information is integrated with business plans, so that resources can be aligned accordingly. There is potential to link this work to other university activities / plans in a holistic approach that leads to efficiency improvements through the management information gained. This could involve, for example: staff performance development and review, activity costing, TRAC and the REF, successor to the RAE. These are areas that will need to be discussed and agreed upon in the initiation period. However, whatever approach is taken, efficient and effective systems will require simplicity of operation and appropriate support, in the form of staff, systems and

training, such as for subject group leaders with responsibility for allocating work, and heads of school for overall balancing of resources. The resulting discussions are likely to include detail on the scope and transparency of the framework model.

Discussion on the scope of the framework should cover the work types to be included and the staff involved: full-time, fractional, associate lecturers, new staff and graduate teaching assistants and the implications, both short and longer term, for them within the framework. Discussions should cover also the transparency of the process and its outcomes and on how information will be stored, and accessed in line with data protection requirements. Transparency is commonly seen to mitigate tensions as staff get clearer evidence of generally equitable workloads, however it may also create friction initially as some significant disparities are revealed that cannot immediately be resolved. Thus, sensitivity in these dealings is essential.
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4.1.2 Development

The pace of development of a framework model requires sufficient time for consultation processes and pilot studies to occur without losing the impetus for change. Ownership is enhanced if there is potential for staff inputs into the process for example, through the pilot studies and surveys. Agreements on the timescale for the gradual adoption of a model can be important. A period of up to five years would not be unusual for a university-wide initiative, but would obviously be shorter for a school-based approach. The membership, skills, experience and character of the team leading the development, and the support they have, will be central to the success of the project. A familiarity with employee relations could be significant in gaining support and cooperation from unions.

Diversity within the organisation will require a flexibility of approach that allows local discretion in implementation, whilst adhering to the broad principles agreed within the framework. For example if there are any centrally defined benchmarks for activities this could involve agreement on the degree of local discretion to adjust these weightings.

4.1.3 Maintenance

Outputs from models need monitoring to ensure equity and that equality challenges are met. This includes not just work volume, but the nature of tasks and the wider implications, for example for promotion prospects. At a strategic level any

framework model also needs to be reviewed periodically to ensure that it continues to align with departmental or institutional business needs and operational requirements.

Review may also be needed to respond to contextual changes that affect workloads, this might for example affect weightings given for certain roles and result in revisions to the certain aspects of a model. Surveys to assess thoughts and feelings from a wide range of staff on both the process and its outcomes are a useful way of eliciting contributions to the review and improvement of the framework.

4.2 TECHNICAL DIMENSIONS / MODELS

Findings within the partnership indicate that there is a general move towards the development of university-wide frameworks covering all work types and that this tendency is especially apparent in the larger institutions.

Within this trend there is variation on the approaches taken that includes:

1   **The units of measure**, these may be hours / representative hours that measure inputs, or workload units founded more on outputs such as for teaching and assessment, determined by credit level and students numbers.
2   **The balance principle**, such as whether the allocation works back from a maximum figure or looks to balance activities around an average, such as the median[2] between staff involved.
3   **Activities included**, where there is diverse practice as to which of the main work areas are included in the framework and how they are measured. See below for examples and more detail.
4   **The level of detail involved**, for example to avoid the model becoming too detailed and complex this may include the provision of a small allocation to all to capture numerous small, but disparate tasks.
5   **Information** on how over and under-loads will be managed.
6   **Timescales** within a yearly cycle for providing information such as work plans and how that information is to be disseminated.
7   **Scope** of the model – in that the model should help address equity within a school, but may only be able to influence broader environmental issues, such as surplus / deficit school budgets set at faculty level.
8   **Linkage** of school models across the university to

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[2] Using the median avoids the distorting effects of small numbers of staff with extreme (high or low) loads

achieve TRAC etc, through consistency in overall structure rather than conformity across all the detail. This can, for example, occur through local spreadsheets that articulate with a central database. This information on revenue generation and module costing can help with plans for module development and assist with faculty business plans and budgets.

Figure 3 gives a screen grab example of the scope of one school spreadsheet used by a partner institution[3]. All activities are listed down the side, with hypothetical staff across the top. The first set of columns provide a calculation of raw workload units for the activities, which the head of school has the discretion to weight up or down and then distribute across the staff. For teaching activity the raw units are the output of an algorithm that uses agreed coefficients to multiply credits delivered (fixed element) and the number of students taught (variable element) to create the allocation for the given task. A traffic light system helps the head of school identify the more extreme over and under loads around the school median workload. The data from this spreadsheet, and those for other schools, reconcile to a central university database that generates reports and supports central monitoring activity and analyses on related issues.

Further examples models can be found as files on the MAW website within "partnership outputs / information sheet 3" at www.research.salford.ac.uk/maw . The following sections give some more detail on the issues surrounding the main work elements.

4.3 TEACHING

It was mentioned in Section 3.3 above that the approaches to teaching allocations tend to split into input or output driven. In the former, preparation and delivery are often given a fixed number of hours allowance per contact hour. Assessment time is sometimes calculated as a number of minutes per assignment multiplied by the number of students. For those using an output approach the allocation is typically driven by a fixed factor, such as the credit value delivered, plus a variable factor represented by the number of students studying the module. Of course the allocation of coefficients to a formula is usually the subject of much debate and the default calculations would normally be open to adaptation to meet local circumstances. For example the amount may be weighted up if the course or lecturer is new.

In the input approach the thrust is to represent what people are doing, and in output approach, what they are delivering. In either case the total for a module can, for team teaching, be divided up to reflect the balance of activities. These assessments often work through team consultations led by Subject Group Leaders. Within all these calculations for teaching activity, any contractual weekly and yearly limits must be accommodated within the allocations. In addition there is a major decision to be taken as to whether just the current teaching is taken into account, or if the development of new modules and courses should be explicitly factored in. It would seem only fair that this is included where it is work that the university wishes to see done, but often this future investment dimension is in fact overlooked.

FIGURE 3

EXAMPLE WORKLOAD BALANCING SPREADSHEET

3 Thanks to Professor Grahame Cooper of the University of Salford for creating this example

4.4 RESEARCH

Research is the focus of a strategic drive in most universities and is individually perceived as crucial for promotion prospects. Strangely, however, it is quite common for research allocations to be left as the residual once everything else has been allocated. The major reason for this is probably that it is quite hard to measure compared with teaching activity and it is complicated owing to the dual support system that implies some research activity will probably be open-ended and curiosity driven and other activity will be very well defined within funded projects. In addition of course there is the question of postgraduate research student supervision. Consequently, where explicit allocations are made a decision, parallel to the teaching case, has to be made as to whether to base allocations in advance or in arrears of actual research performance.

In some cases credit will be given just for project income / research assistants won and postgraduates supervised, although the university could choose to reward other tangible outputs such as papers written. However, in universities with significant QR funding, broad elements of time for research are often given, with targets for performance against a basket of criteria. This could mean, say a day or two a week or say 30% of an average workload, to achieve some agreed combination of funded projects won, postgraduates supervised, papers written / accepted and external roles performed. This would all be assessed in arrears with the target achievements being scaled in the context of the quantum of time given.

It is also quite possible to find hybrid approaches where some open-ended time is given, with extra for specific projects or postgraduates. In addition some universities have created 'research only' and 'teaching only' contracts for some identified staff.

4.5 ADMINISTRATION

Administrative tasks, like research, can be hard to assess and break down into those that are associated with teaching or research or those of a more general nature, such as the Head of School role. The allocations can be built up through some assessment of the number of hours involved or through a global allocation where units are used. However, where teaching is the predominant activity, a quite common alternative is to provide "remission" from teaching activities for administrative roles taken on. Owing to the open-ended nature of many administrative roles, an effective practice appears to be to create a tariff for the various duties (using whatever currency is in use) and to have an open discussion with staff leading to a consensus about the relative weights of the jobs in question. This can lead to differences between schools for what appear to be the same job, but often things like the amount of support varies and so this seems to be a second order issue compared with a sense of equity in the given school itself.

For major roles, such as heads of school and deans, weightings are often set centrally with allowances dependent on the size and complexity of the task. For these there is seldom discretion at local level, but for other activities local discretion may be absolute.

5 CYCLES OF ACTIVITY IN DEVELOPING SYSTEMS

5.1 SOCIO-TECHNICAL MODEL

Case study work has shown that the development of systems to manage work loads has been initiated at different universities from various locations, in some from within schools, in others developed and led by central university (Barrett and Barrett, 2009). However no matter where they have started they seem to characteristically run through cycles across the university organisational levels, with the different stakeholder groups stimulating new cycles of activity.

Figure 4 outlines the social and technical activities involved in managing workloads drawing together various elements of good practice seen in universities (dashed arrows indicate areas with potential for significant improvement). Looking at case studies over a longer period reveals the cyclical and dynamic nature of MAW activity that occurs across the organisational levels.

SOCIO-TECHNICAL MODEL
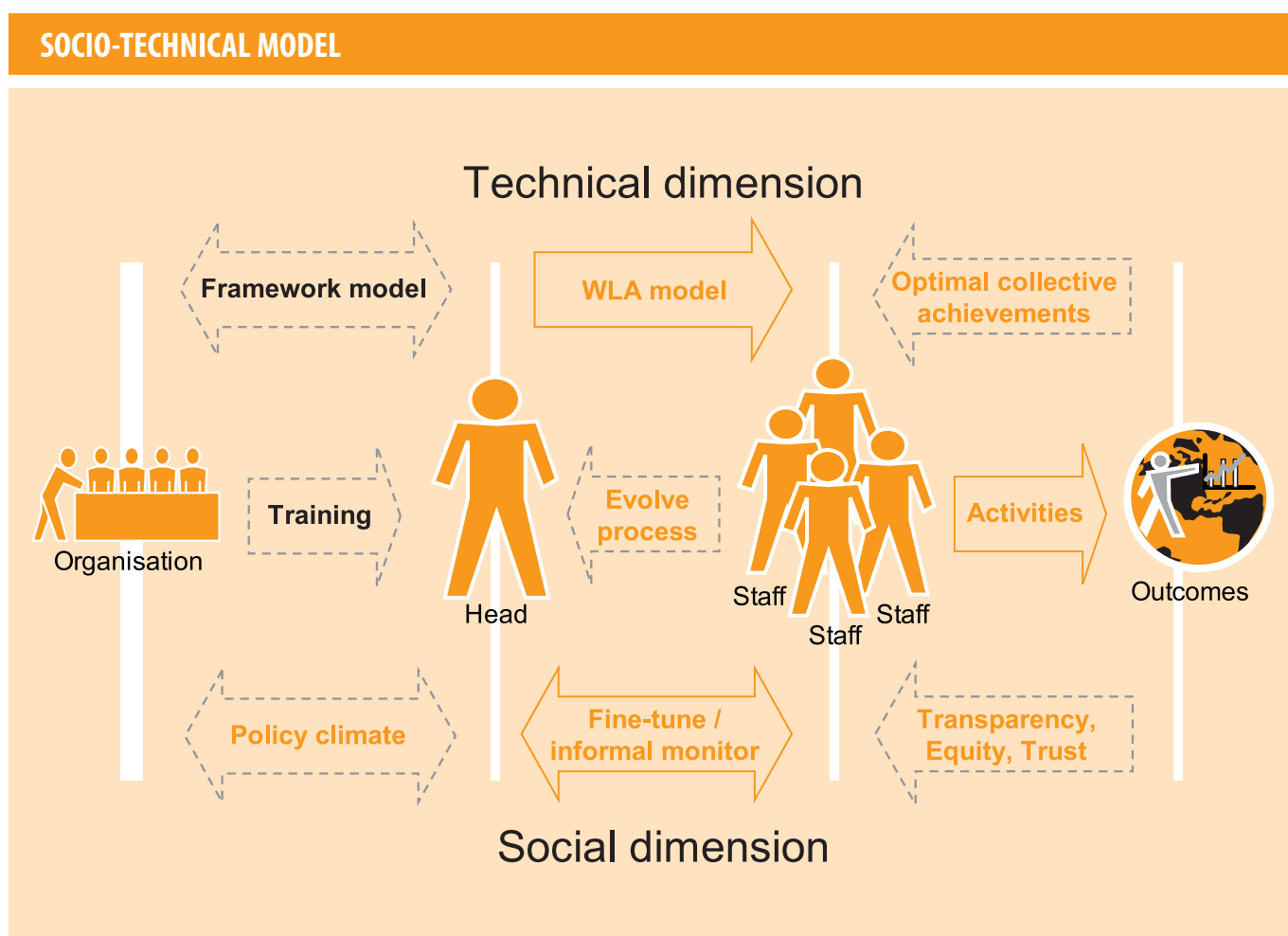
5.2 LONG TERM, DYNAMIC PERSPECTIVE

Activity captured in two case studies over a number of years is shown in Figures 5 and 6. Although this work illustrates just two particularly extended cases, the cyclical pattern holds with other cases reviewed. It shows that activity does not follow a simple linear path of initiation, development and implementation / maintenance, but rather a series of cycles of these elements across the organisation. Activity usually involves exploratory innovative work driven through social processes such as discussion and consultation (divergent), which is then consolidated into more the technical activity (convergent) that integrates work towards implementation. However linear progress is disrupted as different parts of the university are drawn into the process, so that activity can be seen to move in a more cyclical multilevel fashion (Van de Ven A et al. 1999).

Further, although the cases differ in that in Case One activity originated within a school at (A) and Case Two at (1), at University level it seems that any imbalance in the initial focus of activity is offset by another cycle of activity to redress it. For example, in Case One the process moves away from its convergent technical implementation work within a school (E) to a university level involvement because of an organisational desire to use MAW data for TRAC. This moved the process to a divergent phase of engaging the other faculties (F). In Case Two at (6) this sort of cycle can also be seen. Here when university plans for MAW were not being adopted consistently across faculties the diversity of practice triggered another round of divergent activity of consultation to address this.

FIGURE 5

LONGITUDINAL CASE STUDY 1

FIGURE 6

LONGITUDINAL CASE STUDY 2
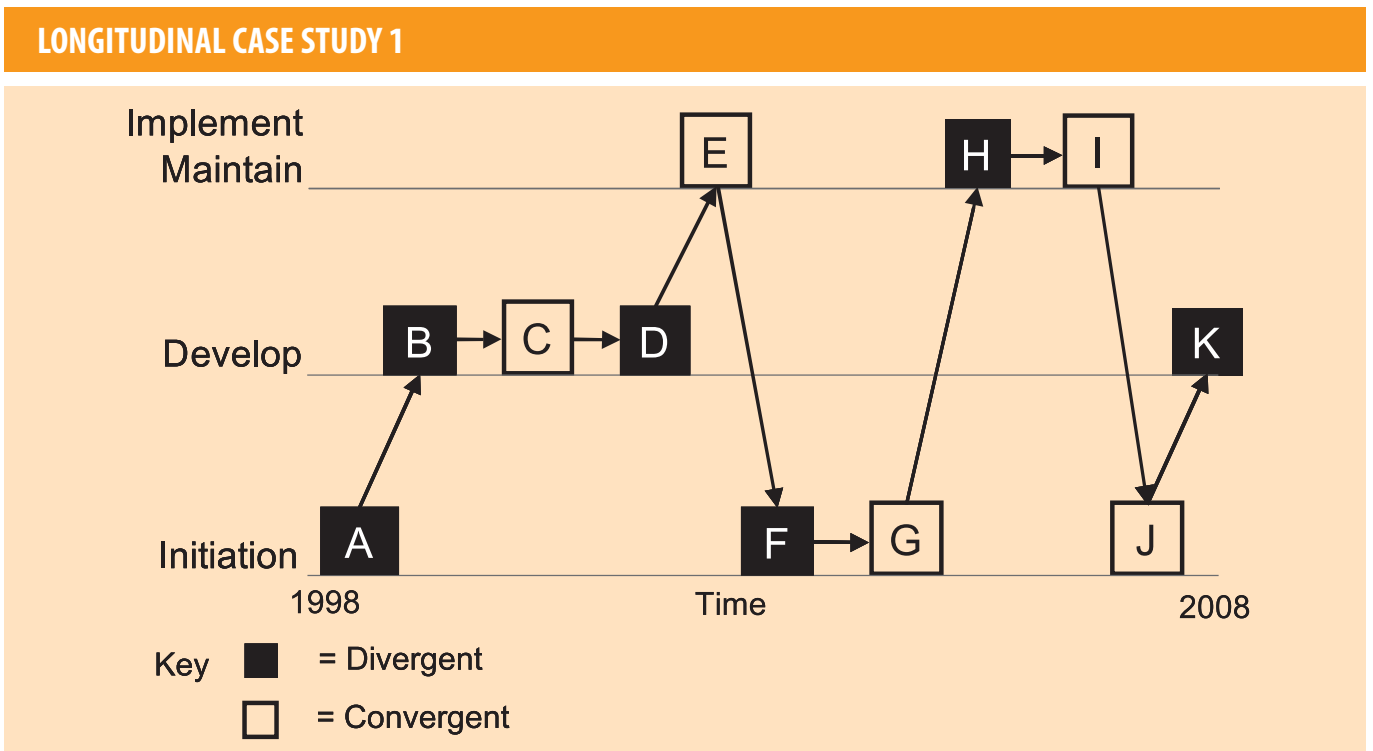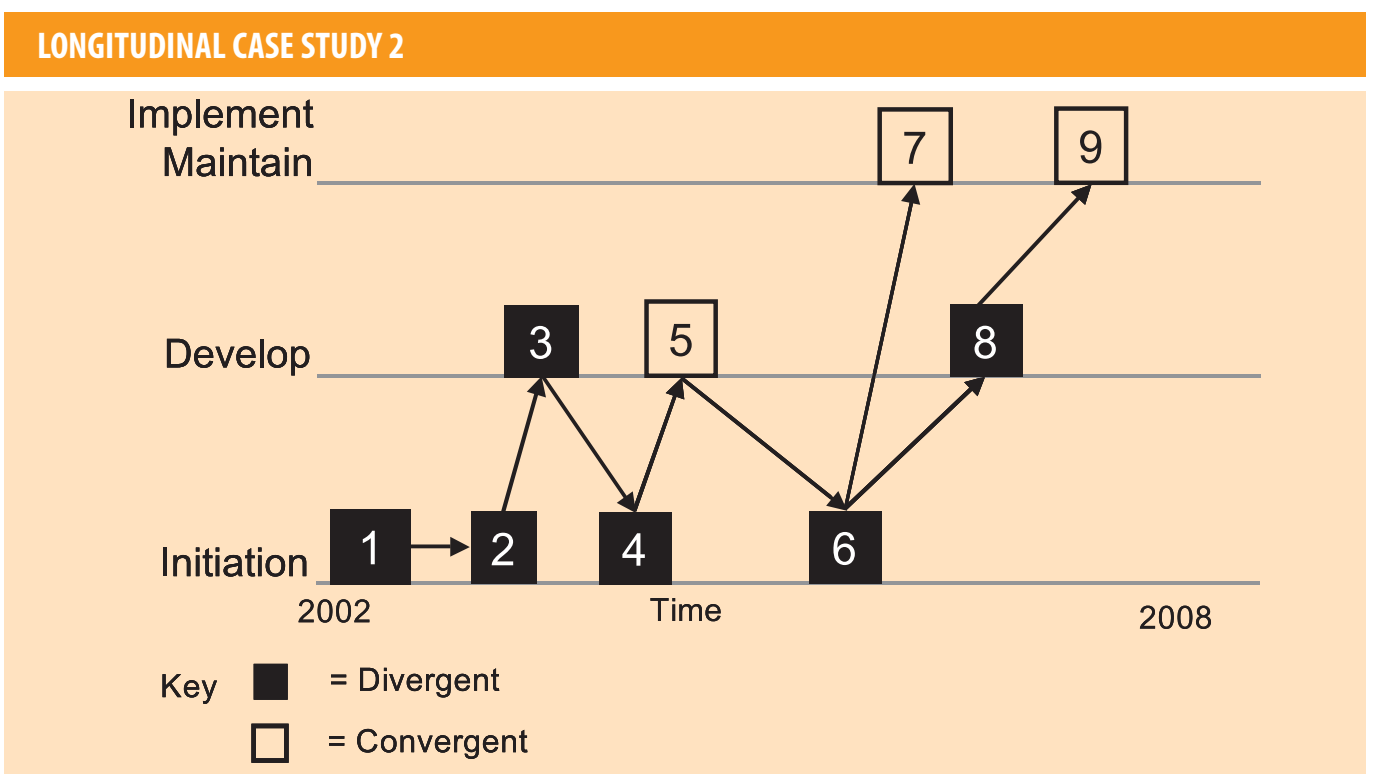
Stepping back from the cases and taking into account the experience of other organisations studied Figure 7 provides a generic representation of the road map for those involved in the ongoing development of MAW systems in universities. This perspective stresses both the organisational levels of individual, department and university; and the dynamic between the social (divergent) and technical (convergent) processes. Emphasis is placed on the interfaces between the organisational levels and the reciprocal actions that might be anticipated.

FIGURE 7

EXAMPLES OF CYCLES OF INNOVATION ACROSS ORGANISATIONAL LEVELS

S – Review sector practice / opportunities
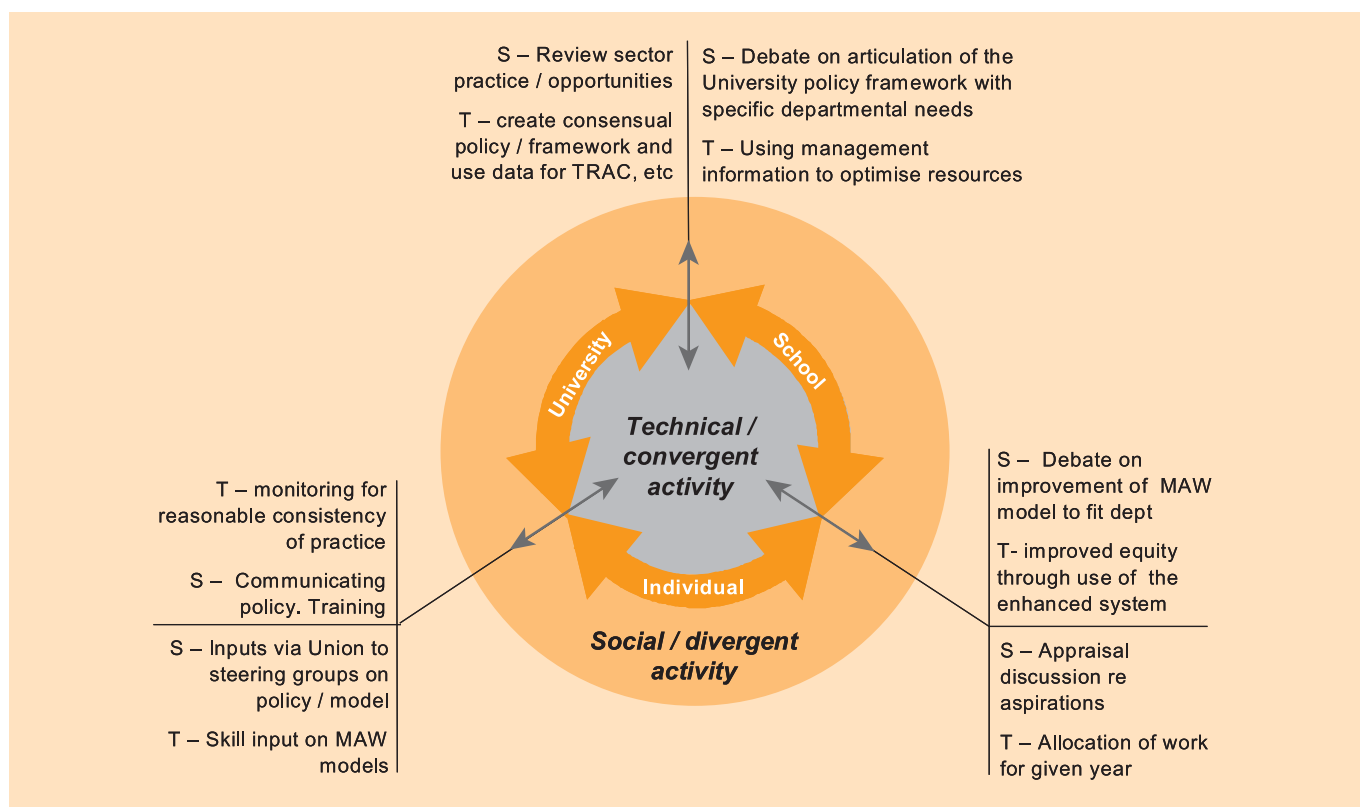
T – create consensual policy / framework and use data for TRAC, etc

S – Debate on articulation of the University policy framework with specific departmental needs

T – Using management information to optimise resources

T – monitoring for reasonable consistency of practice

S – Communicating policy. Training

S – Inputs via Union to steering groups on policy / model

T – Skill input on MAW models

S – Debate on improvement of MAW model to fit dept

T- improved equity through use of the enhanced system

S – Appraisal discussion re aspirations

T – Allocation of work for given year

University

School

Individual

Technical / convergent activity

Social / divergent activity

5.3 PROMPT QUESTIONS FOR DEVELOPING MAW AT EACH ORGANISATIONAL INTERFACE

### Interface 1 – University to Schools
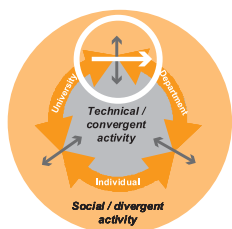
- Has sector practice been reviewed?
- Does the university Policy aim to maximise equity between staff in the distribution of work?
- Does the policy aim to develop a defensible and consistent approach to workload management?
- Does the policy aim to maximise effective use of human resources and to reduce problems of stress related illness occurring from unregulated workloads?

- Does the policy include information on the balancing principle to be used (reflecting any contractual agreements that are in place)?
- How does the policy articulate with any overarching legislation e.g. equality and Diversity, and Health and Safety Executive rulings?
- Does sector practice indicate how often Equality audits be should be carried out?
- Is there senior management leadership support for the process?
- Does the policy include information on the method to be used for workload balancing e.g. university wide framework model with provision for local adaptation or a school model operating within set guidelines?
- Does the policy define to whom the principles of the process extends? - e.g. all academic staff including fractional, hourly paid appointments.
- Does the policy mention what work types/roles are to be included?

- Does the policy include information on how information on workloads will be gathered, collated and used?
- Does the policy include information on transparency in the process and a schedule of when this information will be made available?
- Does the policy include information on the measurement units to be used?
- Does the policy contain advice on the degree of detail and the precision expected in calculations?
- Does the policy include information on the usual period in which workloads should be balanced and the cycle of activities/responsibilities involved?
- Does the policy include information on training to be given to support the process?
- Does the policy include information on responsibility for overall balancing of the model within schools?
- Is there an agreement/expectation on a reasonable load within the school? This might include contractual agreements on hours or relate to a target number of workload units.
- How is ownership of the process understood and shared? Are the responsibilities for the system clearly defined?
- Does the policy state who has the overall responsibility for monitoring the process at university level?
- Does the policy contain information on how much local flexibility there is within any university wide model that is being used? e.g. allocations to given roles or to individuals to accommodate contextual issues
- Does the policy/ include information on how the process articulates with other processes such as strategic and operational planning and appraisal / performance review?
- How is the workload managing system to be resourced to ensure the process operates as set out under university policy guidelines?
- How is information from workload management models used to inform university planning processes?
- What are the expectations on levels of accuracy?
- How will data be stored, spread sheets or databases?
- Does school data reconcile with a larger university system?
- Has ease of implementation been considered in the planning/ development of the model?
- How will over and under loads be detected and dealt with?

Interface 2 – Schools to University
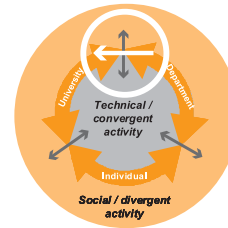
- Has the school engaged with the university debate on workload management for example on their specific contextual issues?
- How is information from workload management models used to inform university planning processes?
- How does information from the model inform planning processes within the school?

Interface 3 – University to Individual
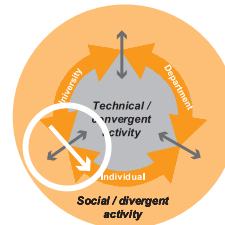
- Does the policy contain information on the consultation processes involving in agreeing a workload, for example between individual staff members and a head of school/ subject group leader?
- What mechanisms have been put in place to disseminate the policy / information?
- How aware are staff of the policy?
- Does the process abide by contractual agreements in place?
- What training is being offered to support the use of any university model/database?
- Does the policy provide guidance on an appeals procedure?
- How will practices that ignore the university policy be dealt with?
- Does the policy include information on who will have responsibility for reviewing policy and any model used and how often this review will occur?
- What mechanisms are being used to assess consistency of practice across the university?
- How will information from models be collected and reviewed to ensure that objectives such as on equity, transparency and equality and diversity are being met?
- Will information (such as on stress related illness,

disputes, staff turnover, student and staff surveys) that might be related to the process, be used to evaluate risks / potential 'hot spots' and to help to formulate responsive action?

### Interface 4 – Individual to University
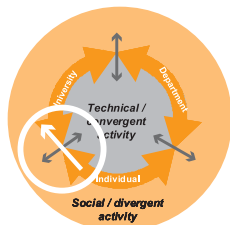
- Has the policy been developed through consultative work between all the main stakeholder groups?
- Is there a working group and/or a steering group involved in the process? Are all the main stakeholders represented in these groups?
- How does the work of these groups link to other internal committees and to the schools for feedback on MAW development?
- What mechanisms/indicators are there to assess perceptions on the process?
- How will grievance procedures relating to workloads (e.g. equity and equality issues) get handled within the process?
- How are the skills and expertise of individual staff members captured within the process?

Interface 5 – School to Individual
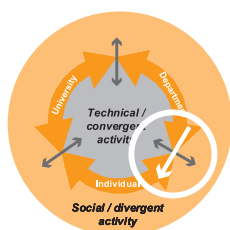
- What are the mechanisms for consultation with individual staff prior to data entry to the model?
- Within these consultations are staff encouraged to consider their own responsibilities to control their work and not unduly or consistently exceed the requirements of an allocation?
- What is considered an acceptable level of detail for the model?
- Are all staff involved in the process trained in the use of the chosen model?
- Does the allocation include all main work types and work to optimise the compatibility of roles and match

of skills to demands? Does this extend to staff on fractional contracts?
- How will the equity of allocations be demonstrated within the model?
- How will it be ensured that roles are allocated fairly, with due consideration for the implications that many have for promotion and career progression?
- For each individual what level of spread around the school average will be tolerated?
- At what stage / month will decisions (tentative and final) for individual workload be communicated?
- How will the all data from the model be made available (published)?
- Is a 'catch all' percentage of a standard workload to be given to cover the numerous varied small elements involved?
- Is extra allowance given within the model for new staff and developmental activities?
- If the system has the capacity for local discretion, does the model have a facility for these discretionary changes to be recorded and so defended?
- How often will a model be reviewed and by whom?

Interface 6 – Individual to School
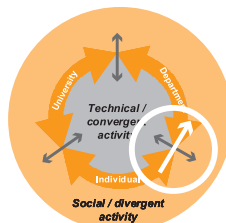
- Does information from the model help to inform staff development, assessment and performance review activities?
- Is there opportunity for staff to voice their concerns about aspects such as working patterns, and understanding role requirements?
- Does the transparency of the process help individuals' understanding on the allocation of resources?
- Does the model help staff awareness on the effective use of resources?

5.4 EXAMPLE IMPLEMENTATION PLAN

Given the large number of issues / options and the fact that normal business must be sustained whilst change is brought about, it can be very beneficial to use early stage discussions to create a clear, but broad implementation plan. It cannot be stressed too often that each institution will follow a unique route to improving its academic

workload allocation practice. This will be based on the characteristics of its staff and their portfolio of activities, on the existence, or otherwise, of good local experience and on the appetite / necessity for change felt at senior levels. Having said that, the following table sets out one example of the sort of activities that could make up an implementation plan over a number of academic years. It must be stressed, however, that each institution should formulate their own plan, drawing from their strengths and prioritising their particular needs.

It could be said that Table 3 seems to represent rather slow progress and it is true that matters could doubtless progress faster, but it would depend on the level of resourcing and commitment for action within the institution. In practice the steps often seem to work best if they run with the cycle of academic years and it does often seem to take at least this long. Given that local ownership and acceptance are very important considerations, steady but strongly progressive action can be beneficial as it allows the changes to be more organic and based on dialogue rather than dictat. Further, like any major university system, after the initial phases ongoing maintenance and development will be needed and a continuous improvement ethos throughout is advisable.

TABLE 3

OUTLINE EXAMPLE OF AN IMPLEMENTATION PLAN

YEAR/STAGE	ACTIONS MIGHT TYPICALLY INCLUDE
Year / stage 1 *Creating a policy*	Institute a University Working Party with a wide cross-section of representation to create a policy for academic workload, including external consultation and engagement by members so that the policy is informed by good practice in the sector.
	Audit existing MAW practices in the schools across the university.
	Ensure full consultation on next year's workloads does happen at appraisals for all staff.
	Explore the possibility of explicitly addressing an emergent workload problem (eg supporting admin peaks with temporary staffing) to create positive momentum.
Year / stage 2 *Finding an initial point of leverage*	From audit, identify a school that demonstrates good practice in its approach to MAW and has an appetite to take the matter forward.
	Support the active exploration of the practical implementation of the policy in that school, both technically, but vitally through the engagement of staff.
	Use this experience to feed into an extension of the University Working Party's activity to identify initial options for an institutional framework model and to identify and address practical blockers, such as a disconnect between the timing of appraisals and the need to fix workloads.
Year /stage 3 *Establishing a University Framework Model*	Link the work of the initially identified school to the most prepared and enthusiastic school in each of the other faculties.
	Support these core schools in exploring practical implementation within the context of the policy and initial options identified for a framework model. Again stressing both social and technical dimensions.
	Through the University Working Party, take the experiences of the core schools and seek to find common, but sufficiently flexible parameters, to create a robust framework model for the university.
Year / stage 4 *Extending the coverage of the Framework Model*	Within the policy and framework model, and using the leading schools as mentors / buddies, extend the enhanced MAW practice to 50% of the remaining schools in each faculty.
	Gain feedback from all involved to the University Working Party, so it can review and finesse the Policy and Framework Model.
	In parallel the University Working Party, working with the leading schools, to seriously address integration issues affecting schools directly, such as: the provision of a shared university model (based on the Framework Model), linkages to performance management processes and using financial data for activity costing.
	Also in parallel, making linkages to university level concerns, such as: informing equality and H+S, etc and monitoring / meta-data options for MAW itself.
Year / stage 5+ *Achieving an integrated University wide provision*	Within the policy and framework model, and using active schools as mentors / buddies, extend the enhanced MAW practice to the last 50% of the schools in each faculty.
	Implement the level of integration that has been decided upon, based on the previous year's experimentation.
	The University Working Party to undertake a major review and, based on feedback and discussion, review the Policy and Framework Agreement, plus options for further development / refinements.
	On-going review, maintenance, adaptation and improvement of MAW systems and processes in response to internal / external imperatives.

6 MAW AND WIDER IMPACTS

Beyond the main focus of MAW on achieving a more equitable distribution of workloads across academic staff, there are consequential benefits to be derived in associated areas such as health and safety, equality, and costing information. Each of these areas is discussed in the following sections.

6.1 MAW AND HSE WORK-RELATED STRESS MANAGEMENT STANDARDS

From the occupational group statistics from the labour force survey (Jones et al. 2006) it can be seen that teaching and research professionals are amongst the highest risk groups for work related stress. Kinman and Jones (2004) in their study of HE staff suggest that this is not due alone to hours worked, but to a more complex set of factors, such as

personal control within the work environment and this ties in with Health and Safety Executive (HSE) studies in organisations generally. Through their work the HSE have developed standards to help reduce the levels of work-related stress through addressing six key areas that they see as the primary sources of stress at work. These are: demands, control, support, relationships, role and change.

The HSE insists on the difference between work pressure, which can be positive, and work related stress, that is an adverse reaction to excessive demands. In brief, as part of an organisational risk assessment an initial stage would be to understand how the six risk factors translate to the institution in question and the resulting specific risks for staff. By gathering and analysing information and data an assessment could then be made about who is likely to be harmed and how. The HSE have found that it is after this stage that the process is most likely to break down and not

TABLE 4

THE CONTRIBUTION OF MAW TO HEALTH AND SAFETY ISSUES		
HSE WORK-RELATED STRESS MANAGEMENT STANDARDS		
STANDARD	**RELATES TO:**	**MAW PROCESS CONTRIBUTIONS VIA:**
1. Demands	Volume of work undertaken within reasonable range.	• Agreements on reasonable loads within schools and transparency of allocations.
		• Use of MAW to promote equity through the fair spread of work across staff.
		• Encouragement for staff to be aware of the dangers of working in a way that exceeds requirements of a role.
		• For Heads of school responsibility to use model to check for staff working widely outside school norms. Curtailing unproductive activities.
		• Use of model to help smooth peak periods of workload e.g. exam marking.
		• University monitoring for workloads outside normal parameters.
	Skills and abilities matched to the work. Response to concerns on work environment.	• Consultations with work allocator to match work with staff skills/ abilities/preferences.
2. Control	Ability to inform decisions about how work is undertaken-this includes work pace, patterns and use of skills.	• At university level provision of broad framework model to indicate minimum expectations on MAW.
		• Within that scope at school level to develop a model suited to own needs.
		• Transparency of process to show the spread of workloads.
	Systems in place to respond to individual concerns.	• Individual and peer group consultations / discussions such as on how activities may be undertaken within agreed model.
	Opportunity to develop skills to respond to new challenges.	• Support and acknowledgement within allocation for new development-programmes, module, enterprise, research.
3. Support	Receiving adequate information and support from managers and colleagues.	• Policies and procedures – including university policy agreement, school model, and needs of new staff – e.g. teaching certificate.
		• Information on how MAW model works and on data information access. Training on model system use.
	Systems in place to respond to individual concerns.	• Use of individual and peer group consultations / discussions to elicit and provide help and support e.g. newly appointed staff. Linkage to appraisal process.

move onto the subsequent stages of: evaluating the risks and exploring / consulting about the problems en route to developing solutions / actions to address the specific issues found and giving feedback on the process. When this does occur progressive action plans can then be developed and implemented and progress monitored. Within this cycle data on agreed work should be monitored and reviewed, for example through meetings and surveys, to assess any residual risks and to decide on any further work or data collection needed to help improve outcomes. The law places a duty of care on employers to protect the wellbeing of individuals and address their concerns. So, MAW systems that actively work to balance the demands on an individual, and also highlight cases subject to excessive demands, should assist in this area.

Although the focus and objectives of MAW, in aiming for a transparent and equitable use of human resources, differs from those of the HSE, it can be seen that the information made available, and the processes used in explicitly managing academic workloads, should assist in meeting the HSE objectives too. The data from MAW systems could also help the institution monitor allocations of work and highlight potential problems and take action accordingly. However although having a university-wide system does create the potential to take an institutional level view, it also needs to be twinned with an explicit (evidenced) institutional audit process to check that high workloads are actually being addressed and, if not, that action is demanded and delivered. MAW can significantly contribute to a risk assessment, but it is not suggested that it is a suitable, sufficient and documented risk assessment in itself.

Table 4 spells out in more detail the potential positive connections between the six HSE categories and MAW systems in Universities.

TABLE 4

THE CONTRIBUTION OF MAW TO HEALTH AND SAFETY ISSUES (CONTINUED)		
HSE WORK-RELATED STRESS MANAGEMENT STANDARDS		
STANDARD	**RELATES TO:**	**MAW PROCESS CONTRIBUTIONS VIA:**
4. Relationships	Standards of acceptable behaviour Conflict avoidance and resolution.	• Agreed procedures within schools and at university level for MAW. • Transparency of MAW for all staff in a group by sharing staff MAW plans. • Opportunities for individual and peer group consultations / discussions to help avoid or alleviate conflict. • Explicit forum to discuss workload issues.
	Systems in place to respond to individual concerns.	• Opportunities for individual consultations / discussions to report and respond to issues/ problems.
5. Role(s)	Understanding roles and responsibilities.	• Use of MAW model to ensure inclusion of all work areas into allocation and to optimise compatibility of roles. • Clear understanding of roles and a broad sense of the anticipated proportion of overall work that role should cover. • Use of MAW to provide clear defensible criteria for work allocator on their judgements.
	Systems to respond to any individual concerns.	• Opportunities for individual and peer group consultations / discussions aimed at achieving a fairer distribution of roles - A consequence of latter may be fewer roles for some staff and a less fragmented working pattern.
6. Change	Rationale for change explained and how it is initiated and managed consulted on and discussed.	• Management Information derived from consultative MAW approaches will have been agreed by staff and possess credibility in making a case for change. • Consultation will allow staff influence on what is included in the model and how/ what units/hours are allocated to activities. • Timescales for process discussed and agreed. • Use of MAW system will help continuity when changes of allocating staff occur.
	Systems to respond to any individual concerns.	• At subject group or school level, discussion of MAW information by staff and pilot studies or trials may be used to assess proposals in models or frameworks. • Systems in place for feedback on the process and responsive adaptation at local level and potentially to university policy or framework model.

6.2 MAW AND EQUALITY CHALLENGES

The work from the Equality Challenge Unit shows that different demographic groups behave in different ways, and this is important to managing academic workloads and the longer-term consequences for those different groups. For example, analysis shows that although women make up 42.3% of the academic staff population there is a significant lack of women in senior positions in higher education, for example with only 17.5% at head of school or professor level

(Connor 2008). This may be for a wide range of reasons, such as career breaks, but also women's reluctance to put themselves forward to the same extent as men, albeit when women do apply for promotions they do well (Goode and Bagilhole 1998; Probert 2005).

Further, it seems that there are groups that are at risk of disadvantage from certain institutional practices. For example staff on fractional contracts may find difficulties in reaching the level of activity necessary for submission to the

TABLE 5

THE CONTRIBUTION OF MAW TO EQUALITY CHALLENGE ISSUES: USING THE EXAMPLE OF WOMEN AND CAREER PROGRESSION		
ISSUE	**POTENTIAL PROBLEM**	**MAW CONTRIBUTION**
Transparency	Informal system of allocation with limited ability to assess equity in the size and distribution of roles allowing for any discriminatory process to go undetected.	Criteria and outcomes of allocation transparent, through agreed process/ model highlighting any areas of unfairness and discrimination.
		Planning for and providing a more equitable distribution of work.
Fractional contracts	Inability to create balanced CV to build portfolio of activities necessary for career progression.	Incorporation of staff on fractional contracts into work planning model.
		Consultation leading to provision of balanced work portfolio, incorporating other work areas in proportion to overall contract time.
		Discussion on work patterns e.g. flexibility and availability, to inform work planning model.
		Linkage to appraisal process- training and development needs.
Allocated Roles	Tendency for women to take on or be allocated certain roles,[4,5,6] such as pastoral care, which are often heavy in work terms, but do not facilitate career progression / promotion. Other research has shown women recruited to 'high risk' leadership roles[7].	Through consultations in development of a model and transparency of its outputs: raising awareness of potential problems/ trends leading to more equitable distribution of roles and defensible decisions.
	Incomplete assessment of workloads leading to necessity for extensive 'after hours' working to ensure high quality work outputs and career progression.	Linkage to appraisal process as above.
		Assessment to include all work elements, so that high levels of home working are not required for career progression.

[4] Research showing predominance of success for women in 'staff based' professions / positions rather than line positions (Frankforter, 1996).

[5] From case study interviews (HoS and lecturers) evidence of quite a strong perception that there was a tendency for women to be given pastoral care roles (Barrett and Barrett, 2008).

[6] Evidence from large scale survey that women spend more time on pastoral care and student welfare than men (Probert, 2005)

[7] Research on preferences for recruiting women to a leadership position characterised by: declining performance / high risk /conflict (Ryan and Haslam, 2008).

Research Assessment Exercise, now the REF, which is widely believed to help promotion. For example, statistics reveal that 42% of female academics work part time, compared to 27% of males (Connor 2008) and of submitting departments, 58% of females were entered in the 2001 RAE compared to 74% of males (Hefce 2006). It would seem that certain groups find it harder to be active in research. For example, carers will find themselves disadvantaged in a work culture that favours those who are able to work for long and unsocial hours. Further, although it is recognised that for many part-time work offers flexibility, opportunities for promotion can be affected through the resultant difficulties in building a balanced CV. Further investigations into promotion criteria reveal that there is usually an exclusive requirement for research excellence in the promotion criteria to higher university levels, such as professor (Parker 2008).

One of the problems seems to be around awareness. European law (the European Court in Danfoss C -109/88) anticipates that informal workplace systems will tend to favour men in terms of pay, and that transparency is necessary if there is to be a shift from the status quo. By analogy, transparency of the information in workload systems could help to raise general awareness and sensitivity to the above type of issues when allocating work.

Decisions made at an individual level may seem appropriate and defensible, however, analysis at an organisational level can highlight particular trends and areas of unwitting discrimination. To help avoid this, risk and impact assessments can create focus and prioritise action. But in order to do this information on workload allocation needs to be visible so that an institutional view can be gained. To support MAW processes at school level the university policy on transparency, equity and equality requirements needs to be disseminated widely through a training and development programme. This can be supported by human resource departments, which can then monitor for equitable processes and outcomes.

The main theme coming through from this discussion on MAW and equality issues is the benefit that a transparent MAW system, at school and institutional level, can deliver for the effectiveness of an institution's response to equality issues. The issue of career progression for women is used as an example of the contribution MAW can make to equality challenge issues. See Table 5 and Figure 8.

FIGURE 8

EXAMPLE OF WOMEN AND CAREER PROGRESSION
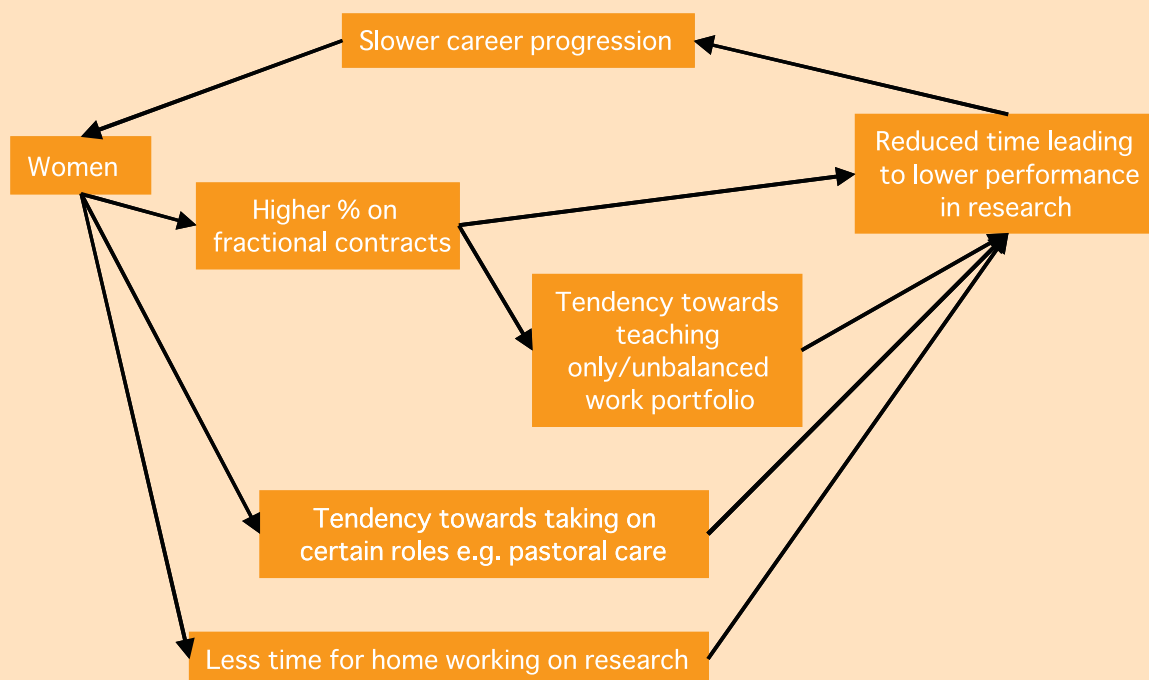
6.3 MAW AND ACTIVITY COSTING AND TRANSPARENCY REVIEW REPORTING

Staff costs are a very large part of any university's expenditure, thus efforts to create workload allocation systems can open up the potential to better understand, at some aggregate level, the activities on which this expenditure is being made. In simple terms, if the time allocations to activities are known these can be linked to financial data to inform expenditure profiles for these activities. This in turn can then be combined with income data for the same activities, leading to an appreciation of the financial viability of each of those activities.

The level of detail at which this analysis is carried out will depend on the granularity of the data in the workload balancing system. If it is at programme level then this will be the limit, but if it goes down to modules then analysis for each by module will be feasible, provided of course that the financial information on income can be accessed in a suitably detailed form. Whether the analysis is limited to a specific school, or is faculty / university-wide will again depend on the scope of the system/s being used in the institution. The principles will be the same, but the articulation with overall university financial data is likely to improve the more broadly the exercise is drawn. Put another way it is well known that if individual schools do costing exercises they would rarely all add up to the university accounts, owing to partial information, interface issues and, of course, skewed perceptions.

Taking the opportunity to use workload data in this way will typically necessitate the close involvement of the financial managers of the university. This is not just to link staff costs to staff time allocations, and income to modules, but also to factor in overhead costs. This can be complex and will be driven by the general approach to overheads within the university. The amounts can be significant as they would typically include for: local support staff, space, general facilities, faculty office operations and activities at the centre. Where this is dealt with on a devolved approach, costs local to the school will be known and these can generally be allocated across the activities using common sense. For example a member of support staff dedicated to undergraduate courses would be allocated across all of these modules, whereas someone specifically supporting research activity would be factored in against this activity, in contrast to say a "school secretary" who would be seen as a general cost to be allocated across all activities. Similar

decisions would need to be made about school space, etc, with faculty and university level costs probably being allocated as general costs.

Ideally this translation of activity data into activity costing information should be relatively automatic once the connections between data sources (within university systems) and the principles driving overhead allocations have been agreed. If it demands substantial manual calculation at a local level every time information is needed then it can be of value, but (a) it probably will not get done, except in a crisis, when objectivity tends to become a scarce resource, and (b) the validity of the data from a general university perspective may be questionable. Ideally it would be a rigorous approach that fairly automatically and regularly provides solid, credible data.

Even if this can be achieved it is still important to remember that this is financial information about activities that can inform managerial decision making, but should not be the sole driver. It can be observed that when this information is first created it can put pressure on Heads of school to consider stopping "loss making" activities. This consideration is right and proper, but the activities could have value beyond the financial picture, for example in connection with a positive image of the school or owing to connections between "loss leader" courses and other more profitable activities. Further, rather than just stopping activities the resulting actions could focus on increasing the income around activities with high (relatively) fixed costs associated with them, such as specialist staff. Of course, schools do have to be viable, however this is defined in the given university, and the sort of financial activity analysis that can be created should be a valuable input to informed decision making that results in adaptations to achieve a balanced and sustainable portfolio of activities. Figure 9 indicates the notion of addressing strategic aspirations in the context of practical constraints, via informed decision-making that results in a balanced, desirable and feasible mix of activities.

This general discussion about extracting activity costing information by articulating with workload balancing data has an interesting linkage through to the whole area of Transparency Review (TRAC) reporting to Hefce. Generally this requirement is addressed by taking sample time sheets from staff for relatively short durations on some rotation basis. From this the information for a TRAC return for the

FIGURE 9

THE ROLE OF ACTIVITY COSTING IN ACHIEVING A BALANCED PORTFOLIO
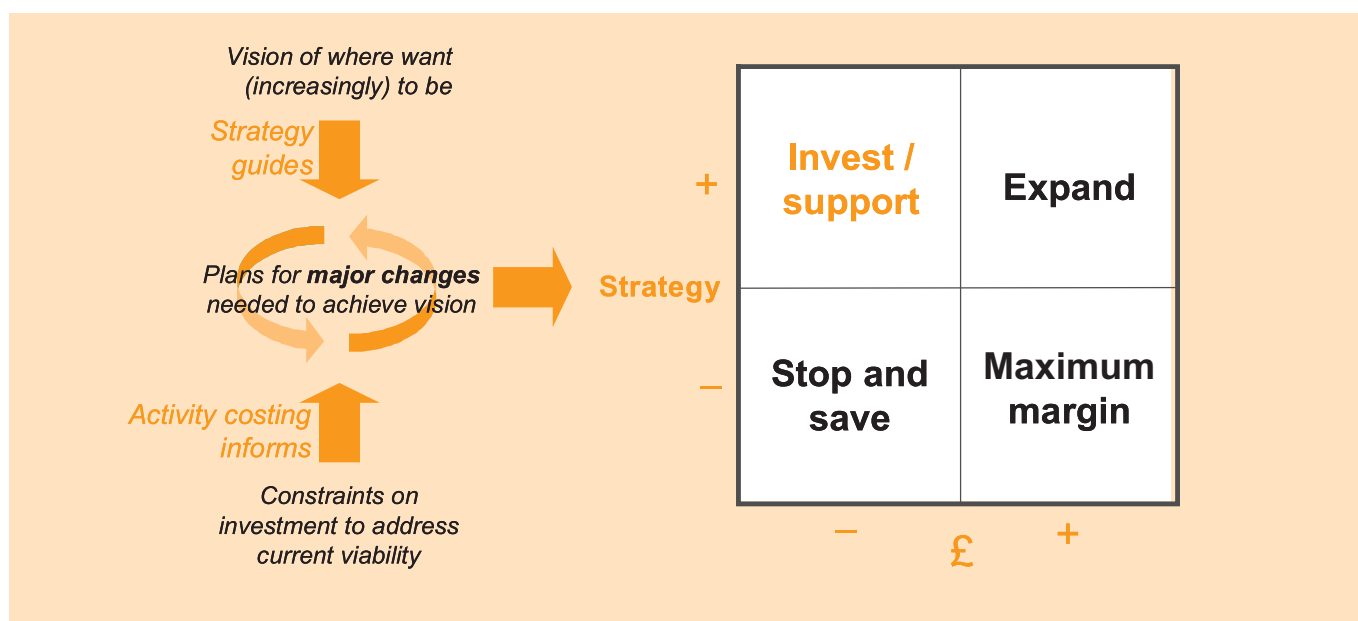
institution is built up and submitted to Hefce. Owing to the fragmentary nature of the source data this information is of little use to inform management decision making internally, although some broad insights can be gleaned. If schools or maybe the whole institution has workload data for staff then, just as activity costing information can be supported, so too can the creation of a TRAC return.

This is not currently encouraged by Hefce, but is "allowed" within the TRAC guidance[8]. Using the phrase "workload planning models" this guidance states that these "could be used as a [proxy for a] time allocation method… however, these can be difficult to design robustly… [and] should be comprehensive – cover all academics and all activities… cover a 12 month period… [and] reflect reality {that is] actual workloads". So far it appears that Salford University is the only institution to base its TRAC return on workload balancing data and has done so from the start.

TRAC has been evolving as it extends to a more comprehensive treatment in which, first research income as well as expenditure was included and then teaching expenditure was added through TRAC(T). Hefce now has

explicit objectives about making TRAC activities move beyond audit to being part of managing a university well. It seems obvious that linking this exercise to rigorous, detailed workload data should result in sounder reporting, but it also means that it can become part of mainstream university management information. To make the linkage work data about workloads must not solely be prospective, i.e. planning information. The data have to be taken from a live, dynamic system, or at least one that is revised and signed off at the end of the reporting period. Additionally, even if activity data that adds to the university accounts are available, to use it for TRAC it has to be interpreted to provide a fully sustainable picture. This means factoring in estimates of capital sinking fund elements that are not normally included, but this can be done and, actually, has to be addressed however the base data is sourced.

So an ideal approach would seem to be to link workload data to the financial information in the university to support both activity costing and TRAC reporting. These would be set up as an efficient, and relatively automatic process, but only after a careful design and implementation process.

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[8] Part 111 Annual TRAC, Chapter C.1 Academic and Research Staff Time, Time Allocation methods, iii Other.

7 CONCLUSIONS AND RECOMMENDATIONS

Balancing academic workloads more equitably and in such a way that it supports the alignment of individual aspirations and institutional imperatives is a fast developing field. It is being driven by ever increasing pressures on the sector, but efforts to address improvements in the approaches and systems used have to avoid simply compounded these pressures by imposing additional demands on managers and staff. So, without simply ignoring problems about workloads, the MAW partnership has been exploring ways of making progress that support improvements, but are orientated towards creating effective and consensual solutions built on integrity and trust. The MAW network activity is "work in progress", however, some clear recommendations have emerged.

Recommendations for universities:
- A consensual policy for the Management of Academic Workloads should be created, if it does not already exist, and it would seem beneficial to make improvements in equity central to this, albeit twinned with achieving alignment between individual and organisational goals.
- The policy should be implemented actively and for this it can be helpful to develop a "framework model" that adds the broad parameters of how the policy should be put into effect in schools, without driving out local autonomy to use informed judgement. The model could extend to being a shared institutional system, but still with a lot of local flexibility.
- Effort should be made to track whether the MAW policy aspirations are being met across the institution. Beyond the focal goals of MAW mentioned under the first bullet point, this can link to positive institutional efforts to address connected issues, such as health and safety (stress) issues, equality aspects, TRAC reporting, activity costing and, of course, the topic of staff appraisals / performance management.

Recommendations for heads of school
- The various approaches illustrated through the MAW work can be used to inform those who are motivated to start matters locally, but crucially it is stressed that this is ultimately aimed at creating consensus around both the process and outcome in terms of equity and that technical models are only a means to this end.

- If successful this sort of initiative can then become a stimulus out of which a University approach can be forged, albeit this will probably differ from the starting point provided by the school as other good ideas are swept in.

Recommendations for staff and unions
- Staff should actively engage in the development of workload systems that can improve the equity of allocations across their school, but should demand the opportunity to provide input into and feedback about the process used as well as the resulting outcomes.
- The drive for more equitable workloads and the opportunity to align activity so that it is productive and makes their members' jobs more secure should appeal to the Unions. There is the opportunity to consider moving towards more flexible contracts with greater confidence in institutions where consensually agreed academic workload management practices are in place.

Recommendation for the Funding Councils
- Building from the findings of the MAW project, the funding councils can, with confidence, give strong encouragement to universities to use rigorous academic workload management approaches to inform TRAC. This would significantly accelerate the take up of the good practice that has been captured by the MAW project and at the same time create internal activity costing information to support informed university management.

Recommendation for the HSE and ECU
- Building from the evidence of the MAW project, it is suggested that these bodies should explore the potential for the management of academic workloads to significantly contribute to the achievement of their goals. This may require further research on the causal connections, but at least in principle the need for an institutional view on MAW could figure as an element in their codes of practice for the sector.

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