

## Workload planning tariffs for 2025/26 - Guidance notes

(a) This is a living document and additional clarification may be added from time to time as needed. These notes will be informed by ongoing work to develop guidance, training and development activities for workload allocators (see (g), below).

(b) The [workload planning tariffs for 2025/26](#) have recently been agreed and published. Changes have been made to the tariffs for assessment (3), and for research (16). The revised research tariff now has two levels of allocation, rather than three, and [guidance on this tariff](#) has been promulgated by the Pro Vice-Chancellor for Research. The allocation for newly appointed staff to complete the EXPLORE programme are now to be included within tariff 14, for Professional and Scholarly Development.

(c) A key priority for Oxford Brookes is the wellbeing of staff. The University is guided by the understanding that it can help colleagues thrive if work is clearly defined, achievable, challenging, and offers other development opportunities. With this in mind, the University procured the WAMS (Workload Allocation Management Software) system, which was implemented in 2020. The aim was to ensure that the University could see that the work allocated to our academics is coherent, fair and meets the needs of colleagues and the institution as a whole.

(d) The successful implementation of WAMS means that the University can now see clearly how it can review the academic workload tariff and constructively develop the way in which workload is allocated, reflecting the broad nature of the work of academics in the 21st century. This is the second successive year in which the Workload Planning Committee has reviewed the tariff and implemented changes. This follows a thorough review process including substantial engagement with the staff body (i.e. an all-staff survey, workshops with around 100 interested staff members, and meetings with UCU) in 2023/24. This year's changes were based on a review of the success of those changes.

(e) Following the review in 2023/24, a joint piece of work with UCU took place in the summer of 2024 to consider whether there should be any changes to the tariff that applies to preparation for existing teaching. After review of the outputs from this work, it was determined by the Committee that no changes were required.

(f) During 2024/25 a [detailed set of guidance](#) on the workload allocation process was developed to support workload allocators to ensure that they are fully supported in their workload allocation activities and are in the best possible position to support their staff.

### General notes

- Over the years the workload tariff has come to be interpreted in a wide variety of ways across the University and this has affected equity and fairness across the University, with decisions being taken piecemeal without broader consultation. While some degree of local discretion is desirable, it should be driven by the principle that the tariff is the starting point for all discussions. Workload allocators should not introduce variations without reference to the appropriate senior management person (PVC or designated alternate) who will forward these considerations on to the University's Workload Planning Committee if needed.

- No workload plan should be considered as final until it is agreed by both the line manager and workload allocator responsible for deploying resources for core university activities. Most often these roles will reside in one individual but occasionally they are different people.
- Accumulation of miscellaneous funding (internal or external), with a view to buying oneself out of teaching and assessment without prior agreement of line management is not allowed. This is because it (a) disrupts the quality of both student learning and student experience, (b) creates excessive workload for other colleagues involved in delivery of core university activities, and (c) creates extra work for workload allocators trying to cover unplanned gaps in provision.
- If individuals consider that they do not have sufficient time to undertake any given task they should discuss the issue with their line manager. The first point of discussion will be to examine *how* they are undertaking the work so that appropriate guidance can be given as to how the work might be carried out in the time available. Training and development needs may be considered as part of this discussion.
- Workload planning is an annual process, but it may be necessary to vary individual workloads within the academic year to meet operational needs. Workload planning activity is exactly that: it is about planning and is not an absolute measure of activity and the precise time taken to complete particular tasks.
- There may be rare cases where a colleague is responsible for workload allocation and line management but has a role where these activities are not included in their duties. In such cases the PVC or designated alternative will, after full consultation, authorise an additional allowance for this activity.

## **1. Scheduled teaching activities**

This remains unchanged from the 2024/25 tariffs as published.

## **2. Preparation for teaching**

This item is for preparation for existing teaching and, after review in 2024, remains at 1.5 hours for each hour of delivery.

## **3. Assessment**

The previous sliding scale of between 0.8 and 2 hours per student, depending on module size, has been simplified and is now limited to 0.8 or 1 hour per student. In this first year of implementation of this change, Programme Leads / Module Leaders may make adjustments to tariffs where previous tariffs were substantially higher in previous years, in agreement with the relevant Deputy PVC.

It is recognised that assessment is one of the major stresses for staff and it is also recognised that the way in which assessment is undertaken needs to be examined across the institution. This will occur during the academic year 2025/26 with a view to making sure that assessment burdens are appropriate and not excessive. This will involve conversations and reviews of different modes and methods of assessment, and looking at how to assess appropriately and effectively (in terms of resource).

## **4. Dissertation/Thesis supervision**

The allocated hours remain the same. Local discretion may be applied for PGR allocations depending on the stage of study and this should be done in consultation with the line manager of the individual concerned and the ADRKE or appropriate research lead, to make sure that any addition is both appropriate and is not impinging upon core activities such as teaching.

## **5. Fieldwork/studies, work placements and any other aspects of teaching and learning not covered elsewhere**

The advice is unchanged but the amount of time allocated needs to be determined by either the PVC or an appropriately nominated alternative.

## **6. New module/programme development**

The hours concerned are to be determined by the Deputy PVC or appropriate alternative on behalf of the PVC with appropriate input from line management.

## **7. Programme Leadership**

This should be within the range of 320 to 480 hours. This includes multiple programme leaderships owned by one person, and individual programme leaderships should not be

accumulated to exceed the 480 hours figure. If there are some non-standard aspects, for example professional body accreditation, then an allowance can be made to meet these particular demands, but they must be carefully substantiated and approved by the Deputy PVC and not added on an ad hoc basis. Programmes which have integrated pedagogic pathways with both master's and undergraduate options, for example in pre-registration healthcare programmes, should not exceed a total of 480 hours. Also, if there are cases where there are several different programmes using the same modules with slightly different pathways, these should not exceed the 480 hours, which should, if necessary, be split between the several individuals who may be concerned. Finally, programmes with very few students should bottom out at 320.

## **8. Subject Coordinators**

The relationship between programme leadership and subject coordinator-ship is somewhat variable across the University. For example, in some cases a subject coordinator will be leading a very large undergraduate programme or a reasonably large postgraduate programme, under the joint guidance of a programme lead who covers both of these options. This will be subject to review in due course as the tariff develops. In the meantime the maximum figures allowed for these two activities should be noted and not exceeded for any individual. Where necessary, the appropriate hours should be split between the programme lead and subject coordinator.

## **9. Module Leadership**

This was reviewed in 2024/25, because the previous guidance lacked precision and led to disparities in how modular leadership is viewed and how workload is allocated across departments, faculties and the whole institution.

Module leadership is one of the key activities for maintaining the quality of the student experience. It requires the module leader to be the lead in (a) owning the vision of the module, including how it fits into the programmes that it may contribute to, (b) making sure that the module contributes to the OBU strategy, and (c) organising and leading the teaching and the teaching team on the module. It is more than 'managing the module'.

The complexity and effort needed to be an effective module leader has two elements. One is routine tasks such as data entry, maintenance of class lists, etc. The other is in supporting students in their studies, managing staff and other contributors throughout the module including field trips, lab work and so on, and in dealing with unusual and abnormal situations from students with special needs and wants.

The new arrangements were intended to better support those leading larger modules by recognising the number of hours needed to do this effectively.

The transition arrangements put in place for HSS last year cease for 2025/26.

## **10. Academic Advisors**

This remains two hours per student per year. Staff and workload allocators should remember that there is ongoing guidance and development regarding the academic advising

role which sets out the University's expectations of Academic Advisors.

### **11. Associate Professors (former PLESEs)**

It is very important that workload allocated to an Associate Professor is based upon tasks rather than a generic or undefined expectation, and also that these tasks are monitored for progress in both PDR and routine line management throughout the year. Associate Professors should not be exempt from teaching and learning and other core activities.

### **12. Newly appointed Lecturers and Senior Lecturers (L/SLs)**

Newly appointed lecturer and senior lecturer on a research trajectory additional allocations remain unchanged but must be agreed by the PVC or appropriate delegate. This allowance is discretionary and not a blanket allowance or entitlement and is expected to be related to specific objectives and outcomes which will be monitored through line management activity and in PDR.

### **13. Citizenship**

This replaced the general administration category in 2024/25. The number of hours remains the same, up to a maximum of 120 hours. The administration baseline is 45 hours with a maximum 90. The recruitment is baseline 15 hours with a maximum of 30 for non-interviewing programmes (e.g. 5 open days). The purpose of re-badging this item was to emphasise the value placed upon the necessary procedures that are required to run a university, on the one hand, and the absolute importance of student recruitment to the University's wellbeing and long-term future on the other. Members of staff who are deeply committed and put significant time into recruitment activities, e.g. on interviewing for programmes, can be given a recruitment allowance exceeding these figures, but this should be both demonstrable and related to specific outcomes.

### **14. Professional and Scholarly Development (including EXPLORE Academic Development Programme)**

This item replaced the generic term 'scholarship' in 2024/25, in order that it should no longer be conflated with research hours. It is available for activities relating to professional, academic and research development. It will be accountable through line management and through PDR with specific objectives.

Mandatory training at Brookes will come from this allocation, as does the allocation for EXPLORE. Academic staff new to OBU are allocated 240 hours to complete the EXPLORE programme, to be split as 100 hours in each of the first and second years and 40 hours for year three. This should be pro rata'd for part-time staff at less than 0.5FTE.

### **15. Doctoral/Level 8 Study**

This remains unchanged.

### **16. Research**

Please see the [guidance notes](#) specific to this tariff.

Research allocations are not finalised until they have been agreed with the Dean for Research, research lead, line manager and, most importantly, the Head of School of the person concerned to make sure that research allocations do not negatively impinge upon delivery of core business such as teaching.

### **17. Knowledge Exchange (KE)**

The two bands are now 320 hours and 160 hours and need to be agreed with line management and appropriate nominations in the faculty before being finalised.

### **18. Research Leads**

The allowance for Research Leads remains unchanged.

### **19. Postgraduate Tutors for PhD programmes**

The allowance remains unchanged.

### **20. UoA Co-ordinators**

The UOA coordinators allowance remains unchanged.

### **21. University Research Ethics Committee**

University research ethics committee – all allowances remain unchanged.

### **22. Collaborative Provision Liaison Activity**

The automatic 160 hours per partnership for liaison activity was removed in 2024/25. This is now determined by the Deputy PVC or alternative as appropriate to the extent and complexity of responsibilities. The reason for this change was because the nature of partnerships has moved on considerably from the time when we were mainly dealing with ACPs. In some cases the workload allocation will be significantly less than 160 hours and in other cases significantly more. The activity needs to be tied into performance goals in the line management process and related to the amount of income being generated by the activity.

### **23. Staff Diversity Network Leadership**

The hours need to be specifically agreed and should be target-related. The Director of EDI can advise if required.