

SCHOOL OF MEDICINE WORKLOAD SURVEY

1. The University recognises that workload attribution varies from School to School but that three principles endure:

Transparency

Recognition of leadership and service

Equity

2. **Context.** About 100 individuals 'deliver service'¹ at the School of Medicine; about 75% are University employees, others are employees of other HIEs or the NHS. About 1/3 work a fractional contract. There is a mix of Education Focussed and R&T contracts. Some staff's wages are paid from the NHS on the premise that their whole time is committed to teaching and assessment, others are on externally funded fellowships with no provision for teaching.

3. Medicine adopts a workload survey system; an iterative process:

a. Individuals start with a job plan, agreed with their line manager. This includes expectations about teaching, service and research time.

b. Individuals record how their time is spent; this informs future appraisal and allows the Ops Group to ensure that teaching, service delivery and leadership duties are transparent and equitable.

c. The survey data is a basis for the next round of appraisal and job planning. It is also used for workload review. Accordingly it is both retrospective and prospective.

4. **The survey serves 3 purposes:**

a. It generates a snapshot of an individual's duties in that year to facilitate discussion on job plan with the line manager.

b. It generates data required to re-distribute duties as staff come and go or request a change and to ensure that distribution of duties is fair and transparent.

c. It generates whole-school data on how the school spends its collective FTE. This is compiled by the School Manager for use by the Ops group and University planning process.

5. **Process:**

a. Staff are sent a 'form'; a 2 page excel sheet; page 1 contains a range of cells open to enter data and the 2nd page generates a personal report from that data. Form to staff in March, forms back to School Manager by the end of April or sooner.

b. On return a pdf of the report is generated and sent to; the individual, the individual's line manager, DoT, DoR.

¹ In this context 'deliver service' is used as a catch-all to describe doing work in pursuit of the School's outputs.

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- c. The data are captured and used to populate the following reports:
 - i. **Report 1.** Anonymised whole-school staff activity.
 - ii. **Report 2.** Whole School commitment to the main domains.
 - iii. **Report 3.** Historical trends.
 - iv. Data can also be used by the EDI committee to ensure that work allocation is fair.
- d. A full bundle of reports are presented to the workload group; a subset of the Ops Gp plus line managers who are not members of the Ops Gp.

6. **Obligations.** In order to ensure that the School has full data with which to plan outputs and workload all staff are to complete the survey.

7. **Metrics.** Absolute metrics are impossible; eg the time requirement of a course director depends on the size of the course, whether new or established and whether in-year challenges arise or the course progresses smoothly. The survey lists some template metrics designed as a guide rather than an absolute value. The range of possible duties and tasks is very long so in the interests of providing a usable look-up table only the tasks applicable to multiple staff members is listed.

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Version Control Record (*expand table as required*)

Date	Revision Description	Major Changes
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