

# ACADEMIC WORKLOAD ALLOCATION USER TOOLKIT 2023 CYCLE



# Introduction

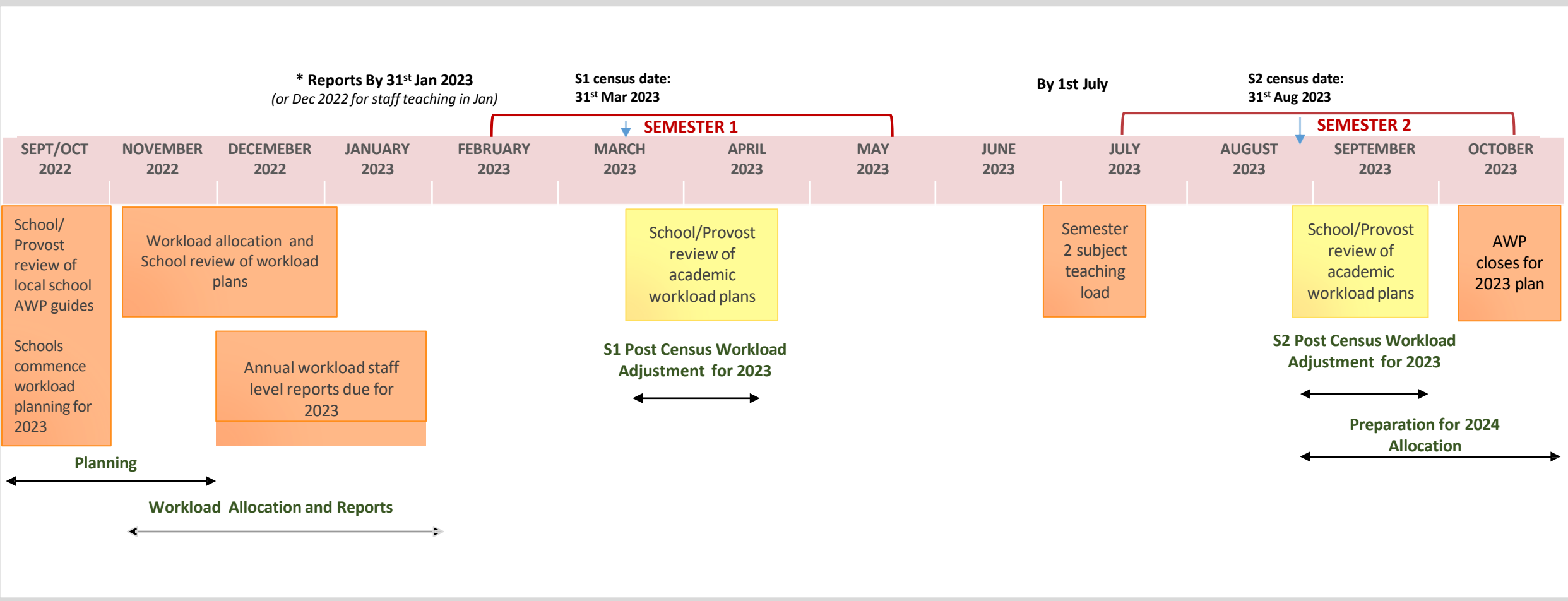
This toolkit has been developed to provide Deans, Heads of Department, Discipline Leads and School Senior Managers with a step-by-step guide on the key activities to be undertaken throughout the lifecycle of Academic Workload Allocation at La Trobe University.

This toolkit should also be read in conjunction with the following resources:

- [Academic Workload Planning intranet](#)
- [Academic Workload Planning Guidelines](#)
- [Local School Interpretation Guidelines](#)
- [Implementation Framework Guide](#)

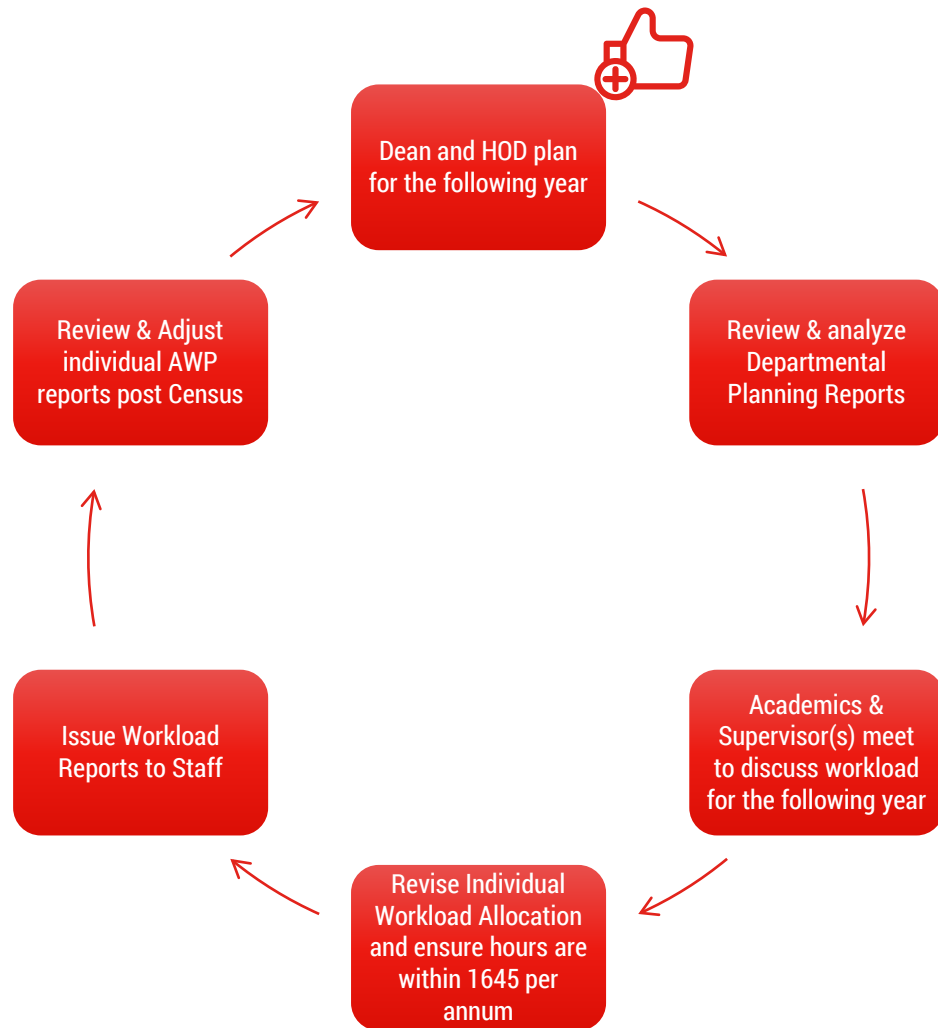
# 2023 AWP SUGGESTED TIMELINES

Cycle period: October 2022 – October 2023



**Notes:**  
 Schools will be provided with research starting point allocations (including HDR supervision) and projected subject level enrolments  
 Any changes required to local school AWP guides require Provost approval before uploading the revised version to the AWP intranet site

# ACADEMIC WORKLOAD PROCESS



The workload planning process has two phases – planning and allocation:

1. **Workload planning** involves the Dean/Head of Department/Discipline Lead initial planning of the allocation for each staff member based on forecast teaching load/research requirements of the School. This phase will determine the forecast workload distribution. Analysis of the planning data will identify workload gaps and casual resourcing requirements.
2. **Workload allocation** aims to distribute workloads among staff equitably, while also ensuring allocated workloads are consistent with the conditions of the Agreement. Within the parameters provided in the Guidelines, Dean/Head of Department/Discipline Lead discretion is applied to balance the workload across discipline/department/school and ensure teaching and research targets can be achieved.



# ACADEMIC WORKLOAD PROCESS

Process	Details
<b>Dean and HoD/DL plan for following year</b>	<p>Actions that may be included in this step:</p> <ol style="list-style-type: none"><li>1. Review of local School AWP guides – changes require Provost approval.</li><li>2. Review of budget and salary profile planning for following year.</li><li>3. Review staff profile taking into consideration planned leave, fraction changes, OSP, promotions, etc.</li><li>4. Confirm subject and instance offerings required for following year.</li><li>5. Confirm any changes to class requirements and assessment for following year.</li><li>6. Decide on any adjustments to the mix of workload allocation percentages for individual staff and confirm in writing (cl 50.14 CA) e.g. formal management or leadership responsibilities.</li></ol>
<b>Review and analyse Departmental/Discipline planning reports</b>	<p>Actions that may be included in this step:</p> <ol style="list-style-type: none"><li>1. Review starting point research allocations and supplementary research performance information (e.g. NTROs/Commercialisation).</li><li>2. Review GRS allocations.</li><li>3. Review subject data (current year subject enrolments provided).</li><li>4. Review non-class teaching data.</li><li>5. Review service data.</li><li>6. Collate information from staff of their service, non-class teaching and other expected contributions for the following year.</li><li>7. Data entry of amendments and calculation of estimated workload.</li></ol>

# ACADEMIC WORKLOAD PROCESS

Process	Details
<b>Academics and supervisor/s meet to discuss workload for following year</b>	<p><b>Actions that must be included in this step:</b></p> <ol style="list-style-type: none"><li>1. Communicate with staff (in person, phone, email) to discuss proposed workload for following year.</li><li>2. Provide staff opportunity to raise any issues under 'unreasonable workloads' (CA clause 50.21).</li></ol> <p><b>Action that is highly recommended in this step:</b></p> <ol style="list-style-type: none"><li>1. Record the conversation in writing e.g. follow up email, if verbal discussion, as evidence discussion has occurred and a shared understanding of the discussion.</li></ol>
<b>Revise individual workload allocations and ensure hours are within 1645 per annum</b>	<p><b>Actions that must be include in this step:</b></p> <ol style="list-style-type: none"><li>1. Ensure the workload allocation is no more than 1645 hours (CA clause 50.4)</li><li>2. Any matter of 'unreasonable workloads' have been addressed (CA clause 50.21)</li><li>3. Allocations comply with the workload profiles (CA clause 50.15)</li></ol>

# ACADEMIC WORKLOAD PROCESS

Process	Details
<b>Issue workload reports to staff</b>	<p><b>Action that must be included in this step:</b></p> <ol style="list-style-type: none"><li>1. Distribution of individual reports within the timelines outlined in the CA (clause 50.9)</li></ol> <p><b>Actions that may be included in this step:</b></p> <ol style="list-style-type: none"><li>1. Distribution of any other information required by Subject Coordinators e.g. estimated enrolments, classes allocated to the individual staff member, sessional allocation for subject, other colleagues involved in subject. [Report coming in Phase 2].</li><li>2. Export a copy of Delegate – Staff Summary Report when approving latest version of workloads for school records.</li></ol>
<b>Review and adjust individual AWP report post census</b>	<p><b>Actions that may be included in this step:</b></p> <ol style="list-style-type: none"><li>1. Review of individual workloads following census date.</li><li>2. Adjustments by exception, where substantial change to workload has occurred.</li><li>3. Further discussion and recording of the discussion with staff where required.</li><li>4. Redistribution of individual report to staff who have been adjusted.</li><li>5. Version approved (post first census date). This doesn't prevent updates to content and workloads throughout the year in working version.</li><li>6. Schools confirm with AWP Team after each post census update that versions have been approved.</li></ol>



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