

Policy Title: Practical Guidance for Schools and Departments on the Development and Application of Academic Workload Distribution Models

Decision: Screen Out

Contact: Fiona Wills

Date of Completion: 27 March 2026

## Part 1: Policy Scoping

### Information about the policy

Name of the Policy

Practical Guidance for Schools and Departments on the Development and Application of Academic Workload Distribution Models

Is this an existing, revised, or new policy?

This is an addendum guidance document for the existing document named the Balanced and Appropriate Workload Distribution - Guidance Framework. The addendum has been developed to be read alongside the existing Framework which has not been changed. The addendum to the Framework is named Practical Guidance for Schools and Departments on the Development and Application of Academic Workload Distribution Models.

What is it trying to achieve?

The University's workload allocation model for academic staff, known as the Balanced and Appropriate Workload Distribution - Guidance Framework (the framework), was developed in 2013. In the twelve years of operation, schools have applied the framework to suit their particular operating context. The aim of the addendum is to provide additional guidance to Schools and Departments on the development and application of academic workload distribution models.

The guidance sets out to:

- achieve an approach to workload distribution which is based on transparency and fairness, and supports equality, diversity, and inclusion and the wellbeing of its staff.
- provide workload allocation guidance to support staff in achieving a work-life balance that allows them to flourish in both.
- establish a framework which provides a vehicle for predicting and addressing work overload and stress arising from work overload, so that wellbeing issues can be addressed.
- address particular workload challenges for hourly paid workers and salaried part-time staff.

The guidance supports the University's People, Place and Partnership: Delivering Sustainable Futures for All Strategy. The strategy includes a commitment to taking proactive stances on equality, diversity, and inclusion; and a commitment to helping our staff achieve a work-life balance that allows them to flourish in both.

Are there any Section 75 categories which might be expected to benefit from the policy? If so, explain how below.

Yes: The following categories are likely to benefit:

- age
- sex (men and women generally)
- disability
- dependants
- sexual orientation
- race

The core principles that underpin academic workload distribution under the current Guidance Framework include a commitment:

- to fairness in workload distribution.
- to achieving a 'balanced and appropriate' workload distribution.
- to openness, transparency and clarity.
- to giving due regard to the health and wellbeing of staff.
- from all parties to flexibility.

Since the Guidance Framework was produced, the University has launched a new institutional strategy: People, Place and Partnership: Delivering Sustainable Futures for All. The strategy makes nine fundamental commitments, two of which are directly relevant to the addendum document:

- Taking proactive stances on equality, diversity, and inclusion.
- Helping our staff achieve a work-life balance that allows them to flourish in both.

These two commitments have framed the development of the practical guidance addendum in two key respects. The new practical guidance addendum ensures that personal circumstances that may have an impact on academic workload are explicitly acknowledged and considered, including:

- Family and caring responsibilities (including maternity, paternity, parental or adoption leave).
- Sex and gender, including periods of absence arising from gender reassignment.
- Disabilities, including neurodiversity, and periods of absence arising from ill-health, including disability or long-term conditions, mental health or injury.
- Part-time working.
- Secondments and career breaks.
- Other personal non-academic circumstances that have a sustained impact on work.

Who initiated or wrote the policy?

The Deputy Vice Chancellor (DVC) initiated the development of this addendum. The addendum was developed collaboratively between negotiation teams from the University (led by the DVC) and the University and College Union (UCU).

Who owns and implements the policy?

The Deputy Vice Chancellor owns and implements the revised Framework across the University. Heads of School will be responsible for implementing the Framework within their respective Schools.

## **Implementation factors**

Are there any factors which could contribute to or weaken the intended aim or outcome of the policy?

No

## **Main stakeholders affected**

Who are the internal and external stakeholders (actual or potential) that the policy will impact upon?

All academic staff

## **Other policies with a bearing on this policy**

What are they and who owns them?

Policy: The People, Place and Partnerships – Delivering Sustainable Futures for all Strategy

Policy owner: Vice Chancellor

Policy: Academic Timetabling and Space Usage Policy

Policy owner: Deputy Vice Chancellor

Policy: Research and Innovation Strategy

Policy owner: PVC Research

Policy: Reasonable Adjustments Process

Policy owner: Chief People Officer

## Available evidence

What evidence or information (both qualitative and quantitative) have you gathered to inform this policy? Please specify details for each of the Section 75 categories below.

**Note:** Evidence can come from many sources. Examples include the University's management information systems, internal or external research, surveys or consultation exercises. The Equality Commission has produced a guide to [signpost to S75 data](#). Anecdotal evidence, such as feedback from service users may also be used.

### Religious Belief

The University's EO data were reviewed. On 6 February 2025, our staff profile was 52.6% Catholic and 47.4% Protestant. Compared with 6 February 2020, this indicates a 2.9% increase in Catholic staff.

On 6 February 2025, our Academic staff profile was 58.7% Catholic and 41.3% Protestant.

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### Political Opinion

The University does not collect information on Political Opinion or make assumptions regarding Political Opinion based on Community Background.

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### Racial Group

The University's EO data were reviewed. On 6 February 2025, our staff profile was 92.3% White and 7.7% Black and Minority Ethnic (BME). This indicates a 2.1% increase in BME staff compared with 2020.

On 6 February 2025, our Academic staff profile was 89.0% White and 11.0% Black and Minority Ethnic (BME).

Our BME profile suggests that we are twice as diverse as the local population, as the Northern Ireland Census 2021 suggests that 3.4% of the NI population is BME.

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## Age

The University's EO data were reviewed. On 6 February 2025, 30.1% of our staff were in the 46-55 age band and 26.1% of staff were in the 36-45 age band. 25.4% of staff were aged '56 and above', which represents a 3.2% increase compared to 2020.

On 6 February 2025, 33.3% of our Academic staff were in the 46-55 age band and 28.1% of staff were in the 36-45 age band. 27.4% of staff were aged '56 and above'.

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## Marital Status

The University's EO data were reviewed. In February 2025, 54.5% of staff were 'Married or in a Civil Partnership', a decrease of 5.5% compared to 2020.

In February 2025, 58.9% of Academic staff were 'Married or in a Civil Partnership', 20.2% were 'Single', with 10.0% identifying as 'Other'.

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## Sexual Orientation

The University's EO data were reviewed. In 2025, 74.2% of staff were 'Heterosexual'; 4.4% were 'Lesbian, Gay and Bisexual (LGB)' and 21.4% were 'Not Known'. This indicates a 2.8% increase in LGB staff compared with 2020.

In 2025, 70.0% of Academic staff were 'Heterosexual'; 4.0% were 'Lesbian, Gay and Bisexual (LGB)' and 26.0% were 'Not Known'.

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## Men and Women generally

The University's EO data were reviewed. In 2025, 58.4% of staff were 'Female'. This indicates a 2% increase in female staff compared with 2020.

In 2025, 49.5% of Academic staff were 'Female'.

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## Disability

The University's EO data were reviewed. In 2025, 6.2% of staff declared a disability, an increase of 1.1% compared with 2020.

In 2025, 5.7% of Academic staff declared a disability or long-term health condition.

Our disability declaration rate is lower than expected, compared with the local population. The NI Census (2021) found that 24% of the NI population stated that their day-to-day activities were limited because of a long-standing health problem or disability.

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### **Dependants**

The University's EO data were reviewed. In 2025, 43.5% of staff had dependants. This indicates a decrease of 2.7% compared with 2020.

In 2025, 46.6% of Academic staff had dependants, 33.2% were 'Without Dependants' and 20.1% were 'Not Known'.

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## Needs, experience and priorities

Taking into account the information referred to above, what are the different needs, experiences and priorities of each of the following categories, in relation to the particular policy or decision? (Please specify for each of the Section 75 categories below the needs, experiences and priorities)

### Religious Belief

None identified

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### Political Opinion

None identified

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### Racial Group

Anecdotally minoritised ethnic staff, particularly women, report carrying a "hidden" workload, including mentoring diverse students, serving on equality committees, and dealing with racialized incidents, which is rarely formally recognized in workload allocation.

The guidance ensures that individual colleague's circumstances that may have an impact on workload are explicitly acknowledged and considered, including black and minority ethnic backgrounds.

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### Age

[Research](#) shows that if an early career researcher (ECR) is to achieve long-term success, the first five years after graduating with a doctorate are critical in establishing long-term career success. Professional development programmes for early career researchers are more successful if they are supported by organisational strategies including workload allocation.

[Vitae](#), as part of its work on the Concordat to Support the Career Development of Researchers, emphasises the need for fair, transparent, and equitable workload allocation for Early Career Researchers (ECRs). Vitae's research indicates that ECRs often experience unequal career development support and struggle to secure dedicated research time.

Anecdotally, older staff in the UK higher education sector (45+) are often heavily involved in administrative or pastoral roles, younger, precarious staff frequently shoulder excessive, unmanageable workloads.

The Practical Guidance for Schools and Departments on the Development and Application of Academic Workload Distribution Models ensures that workload allocation for academic staff, regardless of age, will be taken into consideration.

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**Marital Status**

None identified

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**Sexual Orientation**

Research suggests that academic workload allocation models (WAMs) often fail to account for the additional time spent on pastoral care, mentoring, or equality-related tasks that marginalized staff may take on, leading to "lived inequality".

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**Men and Women generally**

There is a growing volume of [evidence](#) demonstrating how the disruption of academic labour has disproportionately impacted women, especially related to the gendered division of domestic and care labour.

[Research](#) indicates that the management of workloads can disadvantage women through a number of interactive factors. Interruptions in continuity of employment and fractional contracts can work to exclude or hinder research activity, an area pivotal for higher progression.

Anecdotally minoritised ethnic staff, particularly women, report carrying a "hidden" workload, including mentoring diverse students, serving on equality committees, and dealing with racialized incidents, which is rarely formally recognized in workload allocation.

The guidance ensures that individual colleague's circumstances that may have an impact on workload are explicitly acknowledged and considered, including sex and gender, including periods of absence arising from gender reassignment.

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**Disability**

According to [research](#), disabled academic staff often encounter significant additional burdens and challenges at work which impact their ability to manage their allocated workload. These challenges are often unacknowledged and impact their mental health and career progression.

In the UK higher education sector, disability inequality is often embedded in academic workload models that fail to account for the "hidden" labour of managing impairments, resulting in underrepresentation of disabled staff and limited career progression. Workload models frequently prioritize high-volume, standard-speed

output, which acts as a barrier for disabled, neurodivergent, or chronically ill academics.

The Practical Guidance sets out that individual circumstances should be considered on a case-by-case basis. These may include, for example, reasonable adjustments for disabled staff and staff with caring responsibilities for a disabled dependant; phased return to work following illness; or short-term adjustments verified by Occupational Health. Where it is appropriate, a clear reduction in workload should be agreed and incorporated in that individual colleague's workload allocation.

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## Dependants

[Research](#) shows that careful workload planning for academic staff who have caring responsibilities for dependents can better protect work and personal lives, supporting a better worklife balance. Workload allocation should be planned in such a way that any negative impact on carers is avoided.

Colleagues who have taken periods of leave to care for family after an extended leave of four months or more, whether coming back to work following maternity, paternity or adoption leave, or after a period caring for a dependent can benefit from University's Returning Carers' Scheme. In relation to their workload, the new guidance addendum provides for an allocation of hours for protected time to undertake specified continual professional development activities as agreed with their line manager. The allocation should be agreed on a case-by-case basis but will typically be in the region of 10%-30% of the colleague's time for the semester following their return to work. Returning carers can also apply for funding of up to £1,500 from the Returning Carers' Scheme to cover associated costs.

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## Consultation

Consultation with relevant groups, organisations or individuals about the policy can provide useful information about issues or opportunities which are specifically related to them (that is evidence to inform the policy).

Please indicate whether you carried out or intend to carry out any consultation exercises prior to equality screening?

Yes. Negotiation meetings have taken place locally with UCU (the University and College Union) for over 18 months. Meetings have also taken place with Heads of School to understand their perspectives and experiences of managing workload allocations.

Consultation also took place with the Professoriate Executive Committee (PEC).

## Part 2: Screening questions

### Introduction

The answers to the following screening questions will assist the University in making a decision whether or not there is a need to carry out an equality impact assessment on the policy. The following information is provided to help you to identify and comment on the level of likely impact of the policy in question 1 to 4.

#### Select 'major' impact if:

- a) The policy is significant in terms of its strategic importance;
- b) Potential equality impacts are unknown, because, for example, there are insufficient data upon which to make an assessment or because they are complex, and it would be appropriate to conduct an equality impact assessment in order to better assess them;
- c) Potential equality and/or good relations impacts are likely to be adverse or are likely to be experienced disproportionately by groups of people including those who are marginalised or disadvantaged;
- d) Further assessment offers a valuable way to examine the evidence and develop recommendations in respect of a policy about which there are concerns amongst affected individuals and representative groups, for example in respect of multiple identities;
- e) The policy is likely to be challenged by way of judicial review;
- f) The policy is significant in terms of expenditure.

#### Select 'minor' impact if:

- a) The policy is not unlawfully discriminatory and any residual potential impacts on people are judged to be negligible;
- b) The policy, or certain proposals within it, are potentially unlawfully discriminatory, but this possibility can readily and easily be eliminated by making appropriate changes to the policy or by adopting appropriate mitigating measures;
- c) Any asymmetrical equality impacts caused by the policy are intentional because they are specifically designed to promote equality of opportunities for particular groups of disadvantaged people;

- d) By amending the policy there are better opportunities to better promote equality of opportunity and/or good relations;
- e) Differential impact observed and opportunities exist to better promote equality of opportunity and/or good relations.

**Select 'none' if:**

- a) The policy has no relevance to equality of opportunity or good relations;
- b) The policy is purely technical in nature and will have no bearing in terms of its likely impact on equality of opportunity or good relations.

**Taking into account the evidence presented in Part 1, please complete the screening questions (Question 1 to 4).**

## Screening questions

1. What is the likely impact on equality of opportunity for those affected by this policy, for each of the Section 75 categories?

Details of the likely policy impacts on **Religious Belief**

The Practical Guidance is unlikely to impact on equality of opportunity for this group as it bears no relevance to religious belief.

What is the level of impact?

None

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Details of the likely policy impacts on **Political Opinion**

The Practical Guidance is unlikely to impact on equality of opportunity for this group as it bears no relevance to political opinion.

Level of impact

None

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Details of the likely policy impacts on **Racial Group**

The Practical Guidance is likely to impact on equality of opportunity for this group. The guidance ensures that individual colleague's circumstances that may have an impact on workload are explicitly acknowledged and considered, including black and minority ethnic backgrounds.

Level of impact

Minor +

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Details of the likely policy impacts on **Age**

The Practical Guidance is likely to impact on equality of opportunity for this group. The guidance ensures that academic staff in their Early Career, in which their current post is their first substantive appointment in an academic position as a Lecturer must be taken into consideration and reflected in an individual colleague's workload allocation. During their first two years of appointment, they will normally be given deduced allocations in their workload to provide protected space for additional preparation.

The guidance makes provision for all academic staff, regardless of age.

Level of impact

Minor +

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Details of the likely policy impacts on **Marital Status**

The Practical Guidance is unlikely to impact on equality of opportunity for this group as it bears no relevance to marital status.

Level of impact

None

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Details of the likely policy impacts on **Sexual Orientation**

The Practical Guidance likely to impact on equality of opportunity for this group. The guidance ensures that an allocation of time spent on pastoral care, mentoring, or equality-related tasks is accounted for.

Level of impact

Minor +

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Details of the likely policy impacts on **Men and Women generally**

The Practical Guidance is likely to impact on equality of opportunity for this group. The guidance ensures that individual colleague's circumstances that may have an impact on workload are explicitly acknowledged and considered, including sex and gender, including periods of absence arising from gender reassignment.

Level of impact

Minor +

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Details of the likely policy impacts on **Disability**

The Practical Guidance is likely to impact on equality of opportunity for this group. The Practical Guidance sets out that individual circumstances should be considered on a case-by-case basis. These may include, for example, reasonable adjustments for disabled staff and/or staff with caring responsibilities for a disabled dependant; phased return to work following illness; or short-term adjustments verified by Occupational Health. Where it is appropriate, a clear reduction in workload should be agreed and incorporated in that individual colleague's workload allocation.

Level of Impact

Minor +

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Details of the likely policy impacts on **Dependants**

The Practical Guidance is likely to impact on equality of opportunity for this group. The guidance sets out to ensure that workload allocation is planned in such a way that any negative impact on carers is avoided.

Level of impact

Minor +

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2. Are there opportunities to better promote equality of opportunity for people within the Section 75 categories?

**Religious Belief**

No, the guidance sets out to achieve an approach to workload distribution which is based on transparency and fairness, and supports equality, diversity, and inclusion and the wellbeing of its staff.

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**Political Opinion**

No, the guidance sets out to achieve an approach to workload distribution which is based on transparency and fairness, and supports equality, diversity, and inclusion and the wellbeing of its staff.

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**Racial Group**

No, the guidance sets out to achieve an approach to workload distribution which is based on transparency and fairness, and supports equality, diversity, and inclusion and the wellbeing of its staff.

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**Age**

No, the guidance sets out to achieve an approach to workload distribution which is based on transparency and fairness, and supports equality, diversity, and inclusion and the wellbeing of its staff.

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**Marital Status**

No, the guidance sets out to achieve an approach to workload distribution which is based on transparency and fairness, and supports equality, diversity, and inclusion and the wellbeing of its staff.

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**Sexual Orientation**

No, the guidance sets out to achieve an approach to workload distribution which is based on transparency and fairness, and supports equality, diversity, and inclusion and the wellbeing of its staff.

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**Men and Women generally**

No, the guidance sets out to achieve an approach to workload distribution which is based on transparency and fairness, and supports equality, diversity, and inclusion and the wellbeing of its staff.

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**Disability**

No, the guidance sets out to achieve an approach to workload distribution which is based on transparency and fairness, and supports equality, diversity, and inclusion and the wellbeing of its staff.

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**Dependants**

No, the guidance sets out to achieve an approach to workload distribution which is based on transparency and fairness, and supports equality, diversity, and inclusion and the wellbeing of its staff.

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3. To what extent is the policy likely to impact on good relations between people of different religious belief, political opinion or racial group?

**Religious Belief**

Details of the likely policy impacts on **Religious Belief**

The Practical Guidance is unlikely to impact on good relations for this group. The Practical Guidance has no relevance to good relations.

Level of impact

None

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**Political Opinion**

Details of the likely policy impacts on **Political Opinion**

The Practical Guidance is unlikely to impact on good relations for this group. The Practical Guidance has no relevance to good relations.

Level of impact

None

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**Racial Group**

Details of the likely policy impacts on **Racial Group**

The Practical Guidance is unlikely to impact on good relations for this group. The Practical Guidance has no relevance to good relations.

Level of impact

None

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4. Are there opportunities to better promote good relations between people of different religious belief, political opinion or racial group?

**Religious Belief**

No, the Practical Guidance has no relevance to good relations.

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**Political Opinion**

No, the Practical Guidance has no relevance to good relations.

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**Racial Group**

No, the Practical Guidance has no relevance to good relations.

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**Additional considerations****Multiple identity**

5. Generally speaking, people can fall into more than one Section 75 category. Taking this into consideration, are there any potential impacts of the policy or decision on people with multiple identities? (For example, disabled minority ethnic

people; disabled women; young Protestant men, and young lesbians, gay and bisexual people).

Yes

Please specify the relevant Section 75 categories concerned below.

Provide details of the policy impact and data which describes the policy impact.

Racial group, Age, Sexual Orientation, Men and Women generally, Disability, Dependents: All those impacted by this Practical Guidance hold multiple and intersecting identities, however it is envisaged that its focus on enhancing equality of opportunity in workload allocation will benefit these identities in particular.

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## Disability Duties

6. Does the policy provide an opportunity to encourage disabled people to participate in University life?

Yes, the Practical Guidance sets out that individual circumstances should be considered on a case-by-case basis. These may include, for example, reasonable adjustments for disabled staff and/or staff with caring responsibilities for a disabled dependant; phased return to work following illness; or short-term adjustments verified by Occupational Health. Where it is appropriate, a clear reduction in workload should be agreed and incorporated in that individual colleague's workload allocation. This will enable disabled academic staff to participate fully in their role.

7. Does the policy provide an opportunity to promote positive attitudes towards disabled people?

Yes, the Practical Guidance sets out that individual circumstances should be considered on a case-by-case basis. These may include, for example, reasonable adjustments for disabled staff and staff with caring responsibilities for a disabled dependant; phased return to work following illness; or short-term adjustments verified by Occupational Health. Where it is appropriate, a clear reduction in workload should be agreed and incorporated in that individual colleague's workload allocation.

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### Part 3: Screening decision

Based on the evidence considered and outlined in Part 1 and the responses to the screening questions (Part 2), please indicate the screening decision for this policy.

**Note:** The University should take particular care not to screen out policies that have a procurement aspect if there is potential to promote equality of opportunity through the procurement of services.

- Screen in** the policy (that is, subject to an Equality Impact Assessment). The likely impact is **major** in respect of one, or more of the equality of opportunity or good relations categories.
- Screen out** the policy without mitigation or an alternative policy proposed to be adopted (that is, **no** Equality Impact Assessment). The likely impact is **none** in respect of all of equality of opportunity or good relations categories.
- Screen out** the policy and **mitigate the impacts on equality by amending or changing the policy**, or by **developing an alternative policy or action** (that is, **no** Equality Impact Assessment). The likely impact is **minor** in respect of one or more of the equality of opportunity or good relations categories.

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If the decision is to subject the policy to an equality impact assessment (that is, 'screen in' the policy), please provide details of the reasons.

Not applicable

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If the decision is not to conduct an equality impact assessment (that is, 'screen out' the policy), please provide details for the reasons.

Not applicable

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If the decision is not to conduct an equality impact assessment (that is, 'screen out' the policy), and mitigate the impacts on equality of opportunity by amending or changing the policy, or by developing an alternative policy or action, please provide

reasons to support your decision, together with the proposed changes, amendments or alternative policy.

The likely impact is **minor** in respect of one or more of the equality of opportunity or good relations categories, however, the impact is likely to be positive.

The guidance sets out to achieve an approach to workload distribution which is based on transparency and fairness, and supports equality, diversity, and inclusion and the wellbeing of its staff.

This Practical Guidance document will be reviewed one year after it has been implemented and if necessary amended.

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## Timetabling and prioritising

If the policy had been ‘**screened in**’ for an equality impact assessment, then please answer the following questions to determine its priority for timetabling the equality impact assessment.

On a scale of 1 to 3, with 1 being the lowest priority and 3 being the highest, assess the policy in terms of its priority for equality impact assessment.

### **Priority rating for timetabling the equality impact assessment in terms of effect on equality of opportunity and good relations:**

Not applicable

### **Priority rating for timetabling the equality impact assessment in terms of social need**

Not applicable

### **Priority rating for timetabling the equality impact assessment in terms of effect on people’s daily lives**

Not applicable

### **Priority rating for timetabling the equality impact assessment in terms of relevance to the University’s functions**

Not applicable

**Note:** The Total Rating Score will be used to prioritise the policy in rank order with other policies screened in for equality impact assessment. This list of priorities will assist the University in timetabling. Details of the University’s Equality Impact Assessment Timetable will be included in its quarterly Screening Reports.


Is the policy affected by timetables established by other relevant public authorities?

Not applicable

## Approval and authorisation



Screened by:  
Position or Job Title: Director of People and Culture  
Date screened: 17 February 2026

Approved by:   
Position or Job Title: Chief People Officer  
Date approved: 27 March 2026

## Review

This Practical Guidance document is due for review (in terms of its impact on equality of opportunity and good relations) by the policy owner on: 27 March 2027