

Workload Allocation Model (WAM) Policy for education and institutional roles at the School of Public Health (SPH), Imperial

1. Background

Education is a core mission for Imperial as laid out in our ‘Science for Humanity’ strategy and the Imperial Class of 2030 Programme with commitments to ‘nurture the most talented, the most enterprising and the most diverse graduating class we have ever had the privilege to serve’.

As Imperial School of Public Health, Education has been a key contributor to our strategic objectives, societal impact, reputation and sustainability. This policy seeks to ensure that SPH education contributions are recognised, valued and allocated fairly across the School.

1.1 The SPH WAM Policy stems from key provisions outlined in the SPH Strategy 2025 – 35:

- 1.1.1 Recognition of the scale of our **Education mission at SPH** (one of the largest in the Faculty of Medicine) and plans for expansion across all levels: postgraduate (taught and research), undergraduate and professional short courses
- 1.1.2 Our commitment to ensure and improve upon **the quality, flexibility and efficiency** of education delivery, especially in relation to achieving steady improvements in student feedback and experience,
- 1.1.3 Our drive to systematically **quantify and appropriately value our teaching needs and individual contributions to education**,
- 1.1.4 Our aim to improve the quantification, transparency and oversight of **income and expenditure relating to education** with implications for assessing the financial sustainability and risks of existing and newly proposed programmes.

1.2 Furthermore, the SPH WAM policy is informed by findings from the recent Value of Teaching (VoT) Exercise and by expectations and standards set by the Faculty of Medicine, other Imperial departments and the wider UK Higher Education Sector. Details of the working groups approach and analysis are provided in the [WAM Working Group Report](#).

- 1.2.1 Among academic staff, the mean contribution to postgraduate education was found to be 102 equivalent hours per year for 2022-23 and 88 for 2023-24 (**well below the minimum of 200 hours recommended by the Faculty of Medicine**), but this varies hugely, with many individuals having no recorded education contributions, and a few individuals contributing well over 500 hours. This

uneven distribution entails the risk of overload for some academic staff. Note that the VoT data does not comprehensively record all education contributions.

- 1.2.2 Our review of WAM Policies from 13 institutions (10 UK and 1 US higher education institutions (HEIs), and 2 departments within Imperial) revealed that WAM models vary greatly in terms of: scope of work covered in WAM policies, tariffs attached to education and institutional roles and activities, and expectations placed on staff with different types of academic, research and education roles/positions.
- 1.2.3 Of note, the expectations on research, teaching and academic staff varied depending on the type of academic institution reviewed and the scale and priority attached to the education missions. In teaching-heavy institutions, individual time allocations to education were generally high (e.g., 621 hours/year (40 % FTE) to 932 hours/year (61 % FTE) regardless of job family in a University of London WAM). In research intensive institutions, individual time allocations for education varied widely, from as low as 154 hours (10 % FTE) for teaching assistants/fellows and 231 hours/year (15 % FTE) for Lecturers and above at a University of London institution to 851 hours (55 % FTE) for non-early career learning and teaching contract staff at a Scottish HEI).
- 1.2.4 Together, these findings highlight the need for a transparent, proportionate, and flexible WAM policy that is tailored to SPH's context and strategic priorities, and reflects best practice and lessons learnt from across HEIs in the UK and beyond,

2. Principles and values

Building on the background set out above, the SPH WAM Policy seeks to uphold and advance a set of key principles and values outlined below. While this document focuses on **academic and research staff**, many of these core principles are intended to apply more broadly across other job families.

- 2.1 **Equity and transparency** in the allocation of education and institutional roles and activities across SPH staff, recognising different job families and career stages, and promoting fairness in relative contributions towards the SPH strategy and our collective missions,
- 2.2 **Quality and excellence** in contributions to education, supported by a well-designed and coordinated system for feedback, learning, mentoring and upskilling of staff in pedagogical methods and approaches,
- 2.3 **Flexibility and consultation in the design and implementation of the policy**, ensuring that staff voices are incorporated to inform implementation, alongside continuous review and improvement of the system,

2.4 A learning-oriented approach that adapts **best practice and lessons learned** from the higher education sector in the UK and internationally,

2.5 **Fair and inclusive** approaches to balancing opportunities and demands, making appropriate allowance for individual circumstances, including periods of extended leave and other protected or personal commitments, to avoid unintended disadvantage.

3. Scope and tariffs for roles and activities

3.1 The WAM policy covers a defined range of education (both postgraduate and undergraduate) and other institutional roles and activities, which have been designated different tariffs. Full details are set out in [the WAM Tariffs Document](#).

3.1.1 The core education roles include Module Lead, Course Organiser, Programme Director, Exam Board Chair, Senior Tutor, Director of Education and Director of Postgraduate Studies. Through consultation with staff currently undertaking these roles and review of trends across the UK higher education sector, each role has been assigned a clear role description and an associated tariff, expressed either as hours per year or as a proportion of a full-time equivalent (FTE). Role descriptions specify the expected activities associated with each role, (e.g. required participation in module leader days for Module Leads), which are reflected in the assigned tariff for the role. For example, a Master's Programme Director role has been assigned a tariff of 300 hours per year or 20% FTE. Full details of all roles are set out on the [SPH Educational Roles page](#).

3.1.2 Core education activities broadly include lectures (main teaching sessions), seminars/tutorials, assessment and marking, academic/professional/pastoral support, and project supervision, but exclude PhD supervision. As with education roles, core education activities have also been assigned estimated tariffs per unit of activity, with preparation time included where appropriate. Further details are provided in Annex 2.

3.1.3 In addition to the core education roles and activities that are assigned quantitative tariffs within WAM, SPH encourages a range of broader staff contributions that support the delivery of high-quality education. These include, for example, organising or attending SPH education seminars or education days, undertaking education seminars and training organised by the Imperial Education Development Unit (EDU) training, and undertaking external academic quality-assurance roles such as serving as an external examiner. While tariffs have not been attached to these activities presently, staff are expected to record such activities for Annual Review Conversations (ARCs) and promotion applications, where they will contribute to the qualitative assessment of education contributions.

- 3.1.4 Non-SPH Imperial education contributions, such as teaching delivered on courses in other Imperial departments, will count towards WAM contributions whereupon undertaken as part of formal agreements between SPH and the relevant department. These include the ongoing significant contributions made by SPH staff towards the MBBS Course and other undergraduate courses at the Faculty of Medicine and SPH contributions towards postgraduate programmes at Imperial Business School.
- 3.1.5 New initiatives such as design and development of new courses will be considered under specialised tariffs to account for the significant additional course development tasks, assessed on a case-by-case basis.
- 3.1.6 Institutional roles encompass a range of responsibilities undertaken within SPH, the Faculty or at University level that do not automatically arise from an individual's primary job role or education responsibilities. These include committee membership and chairing at SPH level (e.g. Education, Research, People and Culture, Academic Misconduct, Health and Safety, and Information Governance Committees) as well as Faculty- and University -level committees, which staff are encouraged to undertake, such as: Faculty REF Committee, Imperial College Research Ethics Committee (ICREC), the Senate, and the Race Equality Committee. Tariffs for chair and member roles have been established through consultation and are set out in Annex 2.
- 3.1.7 Where committee membership is intrinsic to an education role, it is counted only once within the WAM. For example, participation in the Exam Board by Programme Directors is part of their role and is therefore included within the Programme Director tariff, and not counted as an additional institutional role. Roles that take up less the 1% FTE are excluded from the WAM although these important contributions are valued.

3.2 Activities not currently considered within this WAM

- 3.2.1 The following activities, while **not** currently included within the SPH WAM, are highly encouraged and supported. Staff are expected to record and document these activities for Annual Review Conversations (ARCs) and promotion applications, where they will inform important assessment of overall contributions.
- Research activities (including e.g. attending journal clubs or seminars),
 - PhD Supervision, which is considered within the research mission of SPH,
 - Professional development activities (e.g. EDU courses, Master of Education (ME) and other education qualifications) undertaken to enhance teaching quality,

- External education activities undertaken through personal arrangements with external institutions
- Design and delivery of internal (not SPH Education Offering) research skills or other training,
- Management, design, coordination, and delivery of short courses.

4. Expectations of contributions for academic and research staff

4.1 The expectations set out below are informed by Faculty of Medicine guidance on expected education contributions from academic staff (minimum of 200 hours/year/full FTE) alongside a review of historical SPH VoT data and wider sector standards, as summarised in section 1 above. Institutional roles shall count towards these expected hours alongside education contributions.

4.2 Full-time academic staff (Assistant Professors, Associate Professors and Professors) are expected to contribute a minimum of 250 hours per year towards education and institutional roles and activities. The composition of these minimum 250 hours may vary across staff, with some profiles reflecting a greater emphasis on education contributions and others on institutional roles. In all cases, there is an expectation that no fewer than 60 hours per year are devoted to education activities.

4.3 Full-time research staff (Research Fellow, Advanced Research Fellows, Research Associates and Research Assistants) are expected to contribute 30 hours per year towards education activities. Those who wish to contribute more towards education for teaching career development purposes may do so, in consultation with their line manager, and this will be duly recorded.

4.4 Expected contributions for part-time academic and research staff, as well as for clinical staff, are calculated on a pro-rata basis according to their non-clinical %FTE.

4.5 PhD students may undertake teaching activities as Graduate Teaching Assistants for up to 100-150 hours per year. Any teaching contributions in excess of 30 hours per year must be discussed with the PhD supervisor, with appropriate consideration given to visa and funder-related restrictions.

4.6 These figures are indicative and intended to guide initial allocation processes. It is recognised that actual education contributions will vary between staff based on individual circumstances. These figures may also need to be adapted in response to future developments. Staff will have opportunities to make inputs into allocations, including during annual review conversations (ARCs).

4.7 Allocations will be made on a pro-rata basis according to available staff FTE. Where staff are returning from extended absences (e.g. maternity leave, illness, bereavement, sabbatical and other leave of absence), allocations will be adjusted in consultation with the individual to ensure appropriate and necessary adjustments.

5. Allocation process

- 5.1 New education and institutional tasks (for example, marking or additional teaching) will be allocated with consideration of existing workload commitments, to promote equity and avoid disproportionate burden.
- 5.2 Staff who have continuously served in demanding education and institutional leadership roles for a prolonged period, and delivered to a high standard, may request, typically through their Annual Review Conversation, a grace period of up to one year with no or minimal education contributions during that period, or consideration of sabbatical arrangements where appropriate.
- 5.3 Annual Review Conversations (ARCs) should include and document annual discussions of past and planned education and institutional activities, to ensure that work allocations are appropriate, equitable and aligned with the WAM.
- 5.4 The allocation process will provide staff with opportunities to select suitable education roles and activities based on their expertise and experience. Ultimately, the allocation will incorporate this information alongside the assessed need and available mix of expertise across SPH.

6. Incentivising quality of contributions

The WAM is launched as part of a broad-based strategy to enhance the quality of SPH's education mission and research environment. In particular, the WAM seeks to guard against a default focus on nominal or checklist-based contributions alone. The measures set out in this document will be implemented alongside a range of complementary initiatives aimed at improving quality of both our research environment and education provision, as articulated in the SPH strategy 2025 - 2035:

- 6.1 Instituting dynamic recognition and reward systems that highlight excellence in teaching, marking and feedback of students' work,
- 6.2 Establishing a feedback loop so that all staff participating in teaching and marking activities receive constructive feedback on the quality of their contributions. Previous student surveys have identified marking and feedback as an area for improvement; accordingly, particular emphasis will be placed on monitoring and enhancing the quality of marking and feedback received by students,
- 6.3 Actively promoting the sharing of good practice in education delivery and assessment, for example through SPH education seminars, education away days, peer learning opportunities, and related forums, in order to support collective learning and continuous improvement across the school,

- 6.4 Linking staff to education-skills development opportunities and teaching qualifications through the EDU, and encouraging academic and research staff to attain appropriate teaching qualifications,
- 6.5 Incorporating education and institutional contributions, as well as personal development in pedagogical methods, into Annual Review Conversations (ARCs) with line managers,
- 6.6 Promotion panels shall consistently consider staff contributions to education and institutional activities, including evidence of the quality of these contributions,
- 6.7 SPH, through appropriate committees, will have responsibility for defining, implementing, and periodically reviewing appropriate quality assurance and evaluation metrics across education and institutional roles, and for monitoring their application to inform continuous improvement.

7. Governance

The WAM will be overseen by a SPH WAM Steering Committee, with representation from SPH departments and the Education and the People and Culture committees. The Steering Committee will report to the SPH Director and School Board, and be responsible for:

- 7.1 Overseeing implementation of the system for allocating and recording education and institutional activities in accordance with the tariffs set out in the Policy;
- 7.2 Coordinating with the Director of Education to ensure timely and appropriate allocation of teaching contributions;
- 7.3 Coordinating with SPH leadership to support the fair and transparent allocation of institutional roles;
- 7.4 Reviewing requests for adjustment to allocations, ensuring that any changes are made in accordance with the Policy and in due regard to equity in contributions across staff;
- 7.5 Reviewing the implementation of the WAM, organising staff surveys and other feedback, and updating tariffs, policy and procedures as appropriate.

8. Typical Workload review and allocation cycle

Below, figures 8.1 and 8.2 display the annual cycle for allocation of Teaching related activities and the annual cycle for allocation of educational and institutional roles at SPH, respectively

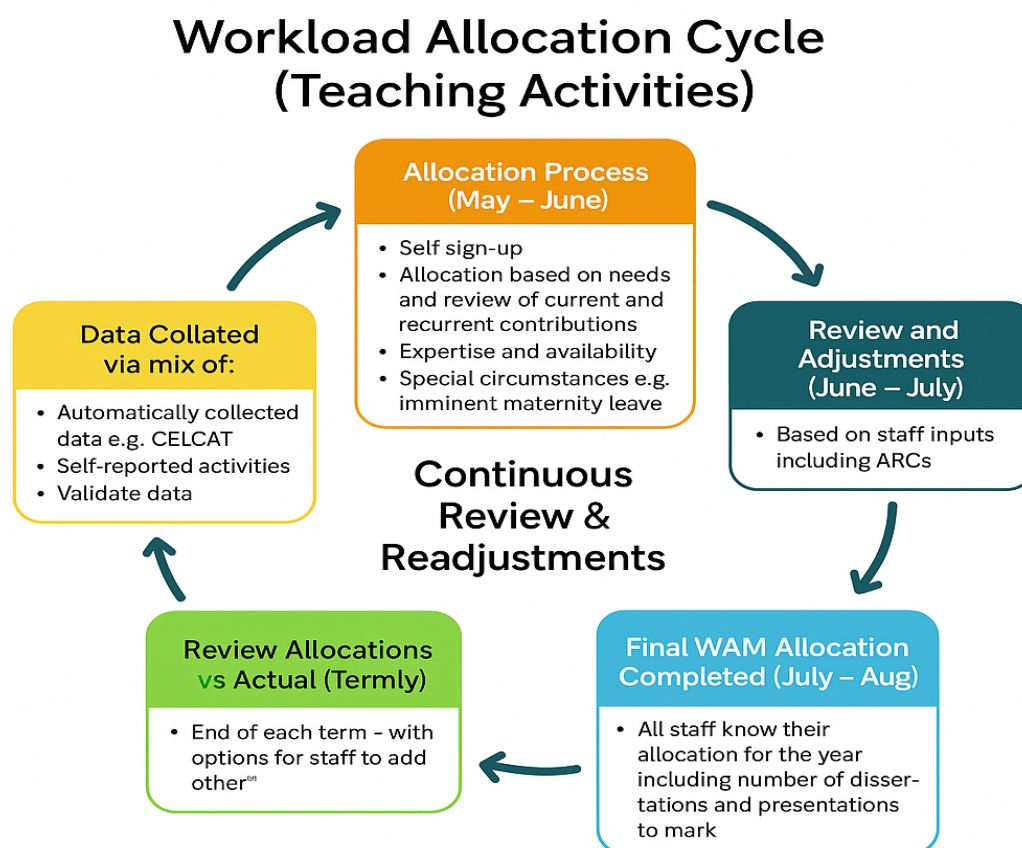


Figure 8.1: Annual cycle for allocation and review of Teaching Activities

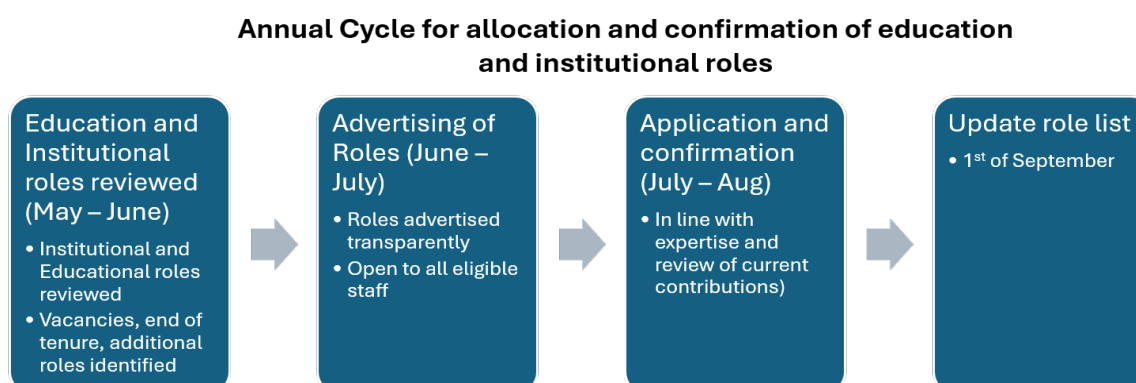


Figure 8.2: Annual cycle for allocation and confirmation of Education and Institutional roles