

**EGERTON**



**UNIVERSITY**

**EGERTON UNIVERSITY STAFF  
WORKLOAD POLICY**

**2019**

## **PREAMBLE**

Our vision as Egerton University is “to become a world class University for the advancement of humanity” while our mission is “to offer exemplary education to society and generate knowledge for national and global development”. To achieve this, the University embarked on developing this Staff Workload Policy to ensure that all staff have reasonable and safe workloads so as to perform their duties to the expected standards. When a workload policy is in place, there shall be work equity and staff will achieve their full potentials in line with the University Charter, Statutes and Strategic Plan.

The University's Strategic Plan emphasizes commitment to excellence in all aspects of our operations. This focus on excellence includes a culture that encourages professionalism, commitment to fair and equitable treatment of its employees, promotion of employees’ opportunities for growth and work satisfaction through a balanced workload.

The Staff Workload Policy is a compilation of policy statements in all areas of staff workload management, including workload responsibility guidelines, workload calculation guidelines and guidelines for workload calculations for both academic and technical staff. This policy has detailed compensation guidelines for large classes as well as supervision of postgraduate theses and undergraduate projects as part of academic staff workloads. Of great importance is the recognition of the centrality of research in planning for workload for staff at Egerton University.

The overall objective of this Policy is to enable staff to manage their workload in a way that is most efficient and effective for the benefit of the University and to align staff workloads to the University Strategic Plan.

This policy shall be reviewed after every three years.

Prof. Rose A. Mwonya

**Vice Chancellor**

## **UNIVERSITY VISION, MISSION, PHILOSOPHY AND CORE VALUES**

### **Vision**

To be a world class University for the advancement of humanity.

### **Mission**

To generate knowledge and offer exemplary education and training to society for national and global development.

### **Philosophy**

Egerton University innovatively influences human development through generation, acquisition, preservation and dissemination of knowledge and skills in Agriculture and related disciplines guided by the core values.

### **Core Values**

The University's activities and decisions are guided by the following core values:

- i) National unity and Social Fairness;
- ii) Integrity, Transparency and Accountability;
- iii) Professionalism;
- iv) Internationalism;
- v) Passion for Excellence and Devotion to Duty;
- vi) Teamwork;
- vii) Passion for Environmental Conservation.

## **DEFINITION OF TERMS**

**Academic Staff** means an employee who has been appointed to teach, train and do research in the University and any other person designated as such by the University Council.

**Academic year** means a period of teaching and examination organised in a full year in either two semesters, three sessions or three academic terms.

**Credit Factor (CF)** means contact hours between a lecturer and students, where 1CF is equivalent to 15 contact hours. Further 1 contact hour equates to 1 lecture hour or 2 hours of tutorial/practical or 3 hours of clinical practice.

**Full Time Staff Equivalent (FTSE)** - is a unit for calculation of the investment of time based on the normal or statutory working hours.

**External Part-time** – includes workload assigned to a non-University academic staff member for a semester or academic year.

**Internal Part-time** - includes any workload beyond 24 CFs (8 units) per year by a University academic staff.

**Statutory working week** - refers to a maximum period of **40 hours** - (8 hrs per day multiplied by 5 working days per week).

**Workload** - is the amount of work or working time expected or assigned to a University employee or group of employees.

**Equitable:** Staff members in comparable grades as per the University scheme of service and staff establishment should have the same workload.

**Reasonable:** In allocating the workload, all practicable steps are taken to facilitate career progression; that the workloads so allocated can be managed within the timeframes and deadlines set for the performance of the duties and allow staff to maintain a reasonable balance between their professional and personal lives.

**Safe:** Means that all practicable steps are taken to minimize physical or mental harm to staff.

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## **1.0 BACKGROUND**

Egerton University is the oldest institution of higher learning in Kenya located 185 km west of Nairobi. Lord Maurice Egerton of Tatton, a British national, founded Egerton as a Farm School in 1939. The School was upgraded to an Agricultural College offering diploma programmes in 1950. The Egerton Agricultural College Ordinance was enacted in 1955. In 1979, the Government of Kenya and the United States Agency for International Development (USAID) funded a major expansion of the institution. Egerton College was gazetted as a constituent college of the University of Nairobi in 1986. Thereafter, in 1987, Egerton University was established as an autonomous institution through an Act of Parliament and when the Act was repealed in 2013, it was granted a charter by the Commission for University Education (CUE).

Egerton University has four campuses which host different faculties and institutes offering a wide range of programmes at certificate, diploma, undergraduate and postgraduate levels. All the programmes are open to both Government and self-sponsored students. The main campus is at Njoro, hosting the faculties of Agriculture, Arts and Social Sciences, Education and Community Studies, Engineering and Technology, Environment and Resources Development, Science, and Veterinary Medicine. Njoro campus also hosts the College of Open and Distance Learning, Confucius Institute and the Institute of Women, Gender and Development Studies. Nakuru Town Campus College houses the faculties of Commerce, Health Sciences and Law. Nairobi City Campus offers selected undergraduate and postgraduate courses in Education, Arts & Social Sciences and Commerce. Kenyatta Campus, which is six kilometres south east of Njoro, hosts the Centre for Capacity Building.

## **2.0 RATIONALE FOR WORKLOAD POLICY**

Workload is a combination of tasks determined and assigned through collegial interaction and self-direction. Units vary in their contributions to the University vision and mission and so it is understood that what constitutes normal workload will vary from one unit to another. At the same time, unit members will experience different demands from time to time in the balancing of domains of workload. This flexibility is important for recognizing the unique aspirations of units and the differences in agreed upon activities of individuals within units. Engaging employees in discussions about their workload and producing fair and transparent workload considerations within the University is intended to assist units and unit members in managing and balancing workloads in order to meet the University's objectives.

### **2.1 Policy Statement**

Egerton University is fully committed to ensuring that all staff have reasonable and safe workloads so as to perform their duties to the expected standards. The University recognizes that when a workload policy is in place, there shall be work equity and staff will achieve their full potentials in line with the University Charter, Statutes and Strategic Plan.

### **2.2 Purpose of the Policy**

The purpose of this policy is to provide guidelines on work distribution amongst staff so as to ensure equity, reasonable and safe workload for academic, administrative, technical and support staff of the University. This aims to enable the staff to manage their workload in a way that is most efficient and effective for the benefit of the University.

### **2.3 Monitoring**

Monitoring of the workload policy shall be carried out on a regular basis by the University Management Board (UMB) to review its effectiveness. This shall be done through regular surveys that will provide opportunity to adjust the workload and ensure proper usage of resources.

### **2.4 Scope of the Policy**

This is a University-wide policy covering academic, administrative, technical and support staff.

## **2.5 Citation**

This policy will be known as the Egerton University Staff Workload Policy.

## **2.6 Responsibilities**

### **2.6.1 Head of Department**

The Head of Department is responsible for:

1. Workload allocation within the Department, setting work priorities in accordance with the University Statutes
2. Ensuring that the workload is equitable, reasonable and safe
3. Ensuring that the allocation of work takes into account the specific skills and expertise of the staff
4. Discussing with staff the most efficient ways of achieving departmental goals
5. Ensuring that the staff are facilitated with relevant resources to accomplish their tasks
6. Monitoring and evaluation of the impact of the workload and ensuring compliance
7. Taking into consideration the staffs' administrative, research and outreach activities when allocating workload with regard to the following aspects of teaching as recommended in the CUE Standards and Guidelines (PROG/STD 17 (7)):
  - i. lectures
  - ii. course co-ordination
  - iii. field trips
  - iv. tutorials
  - v. supervision of laboratory, workshop, studio work, field work, teaching practice, industrial attachment, practicum and internships.
  - vi. review and development of new academic programmes
  - vii. setting, administration and marking of examinations
  - viii. processing of results
  - ix. supervision of both undergraduate and postgraduate students
  - x. examination of proposals and theses.

## **2.6.2 Staff Responsibilities**

Staff are responsible for:

1. Working efficiently and towards achieving departmental/faculty and individual goals
2. Participating in discussions and consultations in the department with the aim of reaching a common understanding of the expectations related to the workload
3. Reporting any workload difficulties and variations to the Head of Department.
4. Acquiring the relevant training, knowledge, skills and experience needed for the job.

### **3.0 WORKLOAD RESPONSIBILITY GUIDELINES**

#### **3.1 Academic Staff**

Each academic staff member is expected to pursue professional duties and responsibilities in each of the three primary domains of intellectual activity: imparting knowledge (teaching and managing students' learning activities), creating new knowledge (research, scholarship and innovation) and transferring knowledge and skills to the community (extension and outreach).

The following overarching principles shall be used as guidelines for allocating teaching in accordance with the Universities Standards and Guidelines of 2014:

- (a) Staff should teach within areas in which they have recognized expertise and ongoing research interests.
- (b) Staff should be conversant with pedagogical processes and application of modern and appropriate technologies.
- (c) Teaching will normally comprise 70% of an individual's annual workload. Any variation to this would be the result of an agreement with the Head of Department to have a heavier or lighter proportion of workload in other areas such as research or service, depending on the particular circumstances of the staff member and the needs of the department.
- (d) The 70:20:10 principle shall apply (see Appendix A).
- (e) A staff member's workload allocation should be discussed and negotiated with the Head of Department in line with the Performance Contract.
- (f) Academic staff at various levels shall be expected to take leadership roles in the delivery of high quality learning and teaching experiences and therefore, Heads of Departments should take into account the workloads associated with these roles throughout the academic year.
- (g) Supervision of postgraduate students shall be allocated teaching hours as part of the workload.
- (h) Supervision of undergraduate projects/practical/microteaching shall be allocated teaching hours as part of the workload.
- (i) Any service offered by the academic staff other than teaching that demonstrates direct benefit to the University shall be considered part of the workload.
- (j) To promote transparency and accountability, a department should develop a method of recording workload that can be audited on a regular basis to ensure that staff are neither overworked nor underworked.

### 3.1.1 Academic Staff Workload

The workload for academic staff shall constitute the following:

- a) Preparation for teaching [preparation/reviewing of course outlines, daily preparation for the course, teaching (lectures/practical), documenting and analysis of attendance and course coverage, seminars and tutorials]
- b) Setting and marking of assessments and examinations
- c) Processing and uploading of examination results
- d) Student academic advising and counselling
- e) Project/practical supervision, field attachment/teaching practice
- f) Supervision and examining projects/proposals/theses for postgraduate students (as per the CUE Standards and Guidelines, 2014)
- g) Personal administration and networking
- h) Attending departmental and faculty meetings
- i) Reading beyond the scope of one's areas of specialization
- j) Membership in Departmental, Faculty and University boards.

### 3.1.2 Academic Staff Workload Calculation Guidelines

The calculation of workload begins with the calculation of the total number of hours in a working year. A '**Statutory working week**' refers to a maximum period of **40 hours** that is taken up by the activities or responsibilities that constitute the workload of an academic member of staff. A '**working year**' refers to a maximum **43 weeks** that are available for work [52 weeks minus (2 weeks of public holidays) + (7 weeks of annual leave)]. Available hours are therefore equal to 43 weeks x 40 hours = **1720 hours**.

These 1720 hours will be accounted for by a variety of activities for which a time allowance will be made based on the ratio of **70: 20: 10** principle to all lecturers for teaching; research (*this includes proposal writing, research workshop/projects, supervision of post graduate students or reviewing research articles and examination of theses/projects*) and community service; and, administration (*inclusive examination officers, course coordinators, programme leaders, chief technologists, standing and ad hoc committees*), respectively. The hours will vary if the proportion devoted to teaching is different in case of administrative staff.

There are 1700 hours to be filled (the 20 hours shall cater for unforeseen events that may disrupt the normal working conditions). The basis of calculation is 8 hours per day for 43 weeks that leads to costing absolutely every kind of activity that an academic staff could reasonably be expected to undertake. This model shall be based upon academic staff commitment to the annual Performance Contract.

### **3.1.3 Calculation of workload**

#### **3.1.3.1 The 70:20:10 principle (Appendix A)**

- a) Teaching shall have a normal academic workload of 24 CFs per academic year (1 CF = 15hrs). There are 30 weeks in an academic year this gives a total of 1190 hours of teaching (70% of 1700 hours).
- b) For the purpose of this policy, large classes shall be taken as comprising 150 students which will be equivalent to 3 CFs. Additional enrolment of students in a course beyond 150 shall be compensated by a multiplier factor (Appendix B).
- c) Variation in a) and b) may arise for speciality courses such as Applied, Medical and Allied Sciences (Appendix C). Where the courses are shared (theory and practical) the respective COD will tally the hours to ensure that the individual lecturer attains 24 CFs.
- d) Research and community activities assume 20% of normal workload which translates to 340 hours per year.
- e) Administration assumes 10% of normal workload which translates to 170 hours per year.
- f) The 1190 hours are the maximum that an academic staff is expected to teach per year. However, acceptance of additional teaching workload is voluntary but shall not exceed 6 CFs per academic year.

#### **3.1.3.2 The 25: 30: 45 principle (Appendix D)**

- a) For academic staff involved in administration, teaching shall have a normal teaching load of 6 CFs per academic year which is 25% translating to 425 hours.
- b) Research and community activities assume 30% of normal workload which translates to 510 hours per year.
- c) Administration assumes 45% of normal workload which translates to 765 hours per year.
- d) For senior management, the 25% teaching proportion may be forfeited and absorbed in administration.

### **3.1.3.3 The 70: 20: 10 principle**

Academic staff involved in:

- i. Library and information services in grade 13 and above (Appendix E)
  - a) Library and Information services will account for 70% which translates to 1190 hours.
  - b) A normal teaching load of 3 CFs per academic year which is 20% translating to 340 hours.
  - c) Research and community activities of 10% which translates to 170 hours.
- ii. Research and Extension (Appendix F)
  - a) Research and community activities of 80% which translates to 1360 hours.
  - b) A normal teaching load of 3 CFs per academic year which is 20% translating to 340 hours.
  - c) For staff not involved in teaching, the 20% teaching load will be forfeited and absorbed in research and community services.
- iii. Laboratory and technical services from grade 12 and above (Appendix F)
  - a) Teaching load (technical services) of 24 CFs per academic year (1 CF = 15hrs) which is 70% translating to 1190 hours.
  - b) Research and community activities of 20% which translates to 340 hours.
  - c) Administration assumes 10% of normal workload which translates to 170 hours per year.
  - d) For staff not involved in research and community service, the 20% will be forfeited and absorbed in laboratory and technical services.
  - e) For staff not involved in administration the 10% will be forfeited and absorbed in laboratory and technical services.

### **3.1.4 Metric for Planning**

The detailed workload calculation will be as indicated in the metric plan (Appendices A, D, E and F).

## **3.2 Administrative, Technical and Support Staff**

The overall ratio of Academic Vs Administrative and Technical Staff in the University shall be 2:1. However, the actual number of the staff in the various Units in the University will be determined by the functions of the Unit, the nature of work to be performed, volume of work in

the Unit and the level of skills and competencies required. This will be assessed by the University Management Board from time to time as approved by Council.

The workload policy shall be managed as follows:

- (a) The University Management Board shall ensure that administrative and support staff workloads are properly managed to create opportunities for development of these cadres. The relevant documentation pertaining to workloads for these cadres shall be contained in the staff member's job description as prescribed by the University Schemes of Service. The workload in any unit will be determined by the volume of work as assessed by the University Management with the principle that there will be a minimum of forty (40) hours per week (five days).
- (b) The workload for these cadres shall be managed in accordance with the following principles:
  - (i) the implementation of the performance contract between government of Kenya through Ministry of Education and Egerton University Council should be monitored monthly;
  - (ii) allocation and management of workload takes into account work requirements and contributes to the efficient and effective application of resources and productivity;
  - (iii) the workload should be equitable, reasonable and not hazardous to the staff health or well-being; and
  - (iv) the workload shall take into consideration the staff members' level of skills, expertise and experience.
- (c) The allocation of work to people living with disabilities, shall take into account the specific skills and expertise which these members of staff bring to their units of work.
- (d) The management of the workload of administrative and support staff shall take into consideration the full range of duties which the staff member undertakes. These shall include:
  - (i) duties specified in job description;
  - (ii) duties taken to cover the workload of absent colleagues;
  - (iii) duties taken to cover vacancies within the Unit; and
  - (iv) duties taken to aid colleagues during periods of high workload within their Unit.
- (e) The management of the workload shall take the following into account:
  - (i) variation in workload caused by seasonal fluctuations of work within their Unit;
  - (ii) requirements or requests to work overtime;
  - (iii) requirements to work in shifts;

- (iv) requirements or requests to work on evenings, weekends or public holidays; and
- (v) actual hours of work.
- (f) Where staff are required to complete training to acquire or maintain skills needed for their job, appropriate adjustments in their workloads shall be made.

Information about the workload allocation for each member of staff shall be held in a file by the Registrar (Human Capital and Administration) to be used as a source of information for review and promotion requirements.

## 4.0 APPENDICES

### APPENDIX A: Metric for Planning for Academic Staff

	per week/year	Teaching (70%)	Research (20%)	Administrati on (10%)	
		Hours	Hours	Hours	TOTAL
<b>TEACHING</b>		<b>1190</b>	<b>340</b>	<b>170</b>	
Lectures (inclusive of preparation of course outline and notes, contact with students, assessments)		720			720
Examination		30			30
Preparation for lectures	1/2hr/course	80			80
Supervision (practicum, project, field attachment)	120	120			120
Examination (proposal, theses)	120	120			120
Meetings, networking and self-reading	4	120			120
<b>Sub-total</b>		<b>1190</b>			<b>1190</b>
<b>POSTGRADUATE SUPERVISION, RESEARCH AND SCHOLARLY ACTIVITIES</b>					
Proposal writing	90		90		90
Data collection and analysis	90		90		90
Scholarly writing and publications	60		60		60
Reviewing books and articles	40		40		40
Consultancy and review meetings	10		10		10
Knowledge transfer	10		10		10
Conferences, workshops and seminars	20		20		20
Capacity building	20		20		20
<b>Sub-total</b>			<b>340</b>		

<b>Administration</b>	<b>4hrs/wk</b>			<b>170</b>	
<b>TOTAL</b>					<b>1700</b>

Source: CUE Standard and Guidelines and data from Academic staff

## APPENDIX B: Calculation of Large Classes CF Compensation

<b>Class size/number of students</b>	<b>Multiplier factor</b>	<b>CFs</b>
<150	1	3
150-200	1.2	3.6
200-250	1.4	4.2
250-300	1.6	4.8
300-350	1.8	5.4
>350	2.0	6.0

## APPENDIX C: Full Time Staff to Student Ratio

Ratio	CUE	Egerton University Ratio vs Best Practices
Academic Staff: student enrolment	Applied Sciences - 1:10 Arts and Humanities - 1:15 Medical and Allied Sciences - 1:7 Pure and Natural Sciences - 1:10 Social Sciences - 1:18	Egerton University-1:25 (13768/545) * University of Copenhagen-1:4.4** Yale University- 1:4.4** Stanford University-1:7.4** Princeton University-1:8.2** Harvard University-.1:9** University of Oxford-1:11**

- \* This was calculated based on undergraduate student enrolment of 2018 and that of full time Academic Staff
- \*\*This was calculated based on data collected for the 2019 World University Rankings by the Centre for World University Rankings

**APPENDIX D: Metric for Planning for Academic Staff Involved in Administration**

	per week/year	<b>Teaching (25%)</b>	<b>Research (30%)</b>	<b>Administration (45%)</b>	<b>TOTALS</b>
		<b>Hours</b>	<b>Hours</b>	<b>Hours</b>	
<b>TEACHING</b>		<b>425</b>	<b>510</b>	<b>765</b>	
Lectures (inclusive of preparation of course outline and notes, contact with students and assessments)		180			180
Examination		5			5
Preparation for lectures	1hr/course	30			30
Supervision (practicum, project and field attachment)	30	30			30
Examination (proposal, theses)	30	30			30
Meetings, networking and self-reading	4	150			150
<b>Sub-total</b>		<b>425</b>			
<b>RESEARCH AND SCHOLARY ACTIVITIES</b>					
Proposal writing	90		90		90
Data collection and analysis	120		120		120
Scholarly writing and publications	100		100		100
Reviewing books and articles	60		60		60
Consultancy and review meetings	30		30		30
Knowledge transfer	30		30		30
Conferences, workshops and seminars	30		30		30
Capacity building	50		50		50
<b>Sub-total</b>			<b>510</b>		
<b>ADMINISTRATION</b>					
<b>Administration</b>	<b>8hr/week</b>			<b>765</b>	<b>765</b>
<b>TOTAL</b>					<b>1170</b>

**APPENDIX E: Metric for Planning for Academic Staff Offering Library Services (Grade 13 and above)**

	per week/year	<b>Lib Services (70%)</b>	<b>Research (20%)</b>	<b>Administration (10%)</b>	<b>TOTALS</b>
		<b>Hours</b>	<b>Hours</b>	<b>Hours</b>	
<b>LIBRARY SERVICES</b>		<b>1190</b>	<b>340</b>	<b>170</b>	
Identify and select relevant information resources/systems, organization of ease of access, awareness creation of information resource, develop relevant information services, train users in access and utilization of resources and preservation and conservation of information resources.		810			810
Repair and maintenance of library equipment		120			120
Repair and maintenance of information materials		130			130
Meetings, net-working and self-reading	4	130			130
<b>Sub-total</b>		<b>1190</b>			
<b>RESEARCH AND SCHOLARLY ACTIVITIES</b>					
Assist in graduate research work	90		90		90
Assist in data collection and analysis	100		100		100
Scholarly writing and publications	60		60		60
Assist in projects	40		40		40
Consultancy and review meetings	10		10		10

Conferences, workshops and seminars	20		20		20
Capacity building	20		20		20
<b>Sub-total</b>			<b>340</b>		
<b>Administration</b>	<b>4hrs/wk</b>			<b>170</b>	170
<b>TOTAL</b>					<b>1700</b>

**APPENDIX F: Metric for Planning for Academic Staff Offering Technical Services**

	per week/year	<b>Practical (70%)</b>	<b>Research (20%)</b>	<b>Administration (10%)</b>	
		<b>Hours</b>	<b>Hours</b>	<b>Hours</b>	<b>TOTALS</b>
<b>TECHINICAL</b>		<b>1190</b>	<b>340</b>	<b>170</b>	
Practical (inclusive of preparation of materials/equipment, contact with students during practical sessions, marking schemes for the practical)		788			<b>788</b>
Repair and maintenance of equipment		120			<b>120</b>
Trial of practical	1hr/course	130			<b>130</b>
Supervision of projects		12			<b>12</b>
Meetings, networking and self-reading	4	130			<b>130</b>
<b>Sub-total</b>		<b>1190</b>			
<b>RESEARCH AND SCHOLARLY ACTIVITIES</b>					
Assist in graduate research work			90		<b>90</b>
Assist in data collection and analysis			100		<b>100</b>
Scholarly writing and publications			60		<b>60</b>
Assist in projects			40		<b>40</b>
Consultancy and review meetings			10		<b>10</b>
Conferences, workshops and seminars			20		<b>20</b>
Capacity building			20		<b>20</b>
<b>Sub-total</b>			<b>340</b>		
<b>Administration</b>	<b>4hrs/wk</b>			<b>170</b>	<b>170</b>
<b>TOTAL</b>					<b>1700</b>

**Review:**

**The policy shall be reviewed every four years or when need arises**