**Equality Analysis**

This form enables you to reflect on your proposed activity, and to assess the potential positive and negative impacts it might have on different members of the community. The Equality Analysis is designed to help you ensure your activities are meaningfully considered and not spending your time on an activity that will later need to be changed or disbanded due to not thinking about the practical needs of diverse communities who we are required to protect. If you have any questions about how to complete this Equality Analysis, please read the [Guidance](https://docs.uwe.ac.uk/sites/equality-and-diversity/_layouts/15/download.aspx?SourceUrl=https://docs.uwe.ac.uk/sites/equality-and-diversity/Documents/Equality%20analysis/Equality%20analysis%20guidance.docx) or contact the Equality, Diversity and Inclusivity Team: [edi@uwe.ac.uk](mailto:edi@uwe.ac.uk).

**Activity Title: New Academic Workload Model System (AWMS) & Model.**

**Project Manager and Contact: Laura Collins (PM), Tom Godwin (BA)**

Proposed activity (change, refresh, policy, process or practice) being analysed

The proposed activity is the implementation of a new Academic Workload Management System (AWMS) to replace UWE’s legacy WAMS system, and a re-designed allocation calculation model to accompany it. The objectives are to provide a modern, scalable, and transparent method for allocating, managing, and reporting academic workload, using an industry-standard model based on direct teaching hours rather than bundles (2.5 hours per bundle). The change will improve fairness, consistency, and efficiency in workload allocation, while reducing reliance on outdated systems.

Academic staff will experience new workload allocations based on the revised model, which may significantly affect some individuals depending on their current allocation patterns. While the new system and model is designed to ensure greater fairness and transparency across the institution, it may result in noticeable changes to how workload is calculated and distributed. Managers and allocators will also experience new processes in how they assign and review workload. Students, visitors, and contractors will not be directly affected.

What sources of information/ data, or who have you identified to help explore potential equalities impacts?

To explore potential equalities impacts, we will draw on a combination of internal and external sources to provide both quantitative and qualitative analysis.

1. UWE staffing statistics (e.g. staff demographics, contract types, part-time vs full-time working patterns, gender, ethnicity, disability, caring responsibilities) to assess whether the new workload allocation model has disproportionate impacts on particular groups.
2. Engaging HE institutions who have recently implemented Simitive AWMS to understand how they handled and built in equality considerations to workload modelling and AWMS implementation, to ensure alignment with best practices.
3. Numerous opportunities for engagement with staff and trade unions through consultation and feedback sessions, including surveys & workshops to capture lived experiences and concerns.
4. Academic and Professional Services managers who are directly involved in workload allocation, to identify potential challenges or unintended consequences for their teams.
5. Staff Networks to test whether workload changes could disproportionately affect staff with protected or intersectional characteristics.
6. Planning Partners and HR to provide expertise on workforce planning, employment law, and compliance with equality obligations.

Assessing the activity from different perspectives

Might your proposal impact people who identify with the protected groups below in the following contexts?

* Access to or participation in UWE Bristol Faculties or Professional Services?
  + There will be a strong impact on the Planning Partners who will need to learn, adapt to and work in a new system with a new model, however we are involving them in the board, model development and implementation. Other than this team, minimal direct impact is expected on students or Professional Services staff. However, academic staff may experience changes in how their workload is allocated, recorded, and communicated.
* Student experience, attainment or withdrawal?
  + There are not perceived to be any direct impacts on students. However, indirect impacts may arise if workload allocation is uneven or perceived as unfair, leading to staff stress or reduced time available for student-facing activity. By improving transparency, consistency, and accuracy, the AWMS is intended to positively support student experience by ensuring staff workloads are more manageable and fairly distributed.
* Staff experience, representation, or progression?
  + This is the most significant area of impact. Some academic staff may see considerable changes to their allocations under the new model, particularly as the shift from “bundles” to teaching hours and tariff categories may alter how their contributions are valued. This could disproportionately affect staff with caring responsibilities, those working part-time, or staff from underrepresented groups who may already face challenges in workload distribution. However, the system is designed to improve fairness, transparency, and consistency, which should mitigate historic inequalities and create a clearer framework for progression and recognition in a more equitable way.

Explain why you have made that assessment and plan your response.

* Carry out equality monitoring of workload allocations by protected characteristic.
* Provide comprehensive and clear communications and training to staff and managers about the principles underpinning the model, the benefits, the key changes and how this will directly impact them. A full comms plan is being executed which contacts different levels of stakeholder to share appropriate information at the right time.
* Use surveys and workshops, staff networks and consultation groups to gather feedback on perceived and real impacts as the work progresses.
* Put in place escalation routes to raise workload concerns, including building workload model review change opportunities into the governance structure.
* Commit to reviewing the workload model after implementation to ensure no group is disproportionately disadvantaged.

**Action Planning**: how will you mitigate negative and maximise positive outcomes?

**Please feed information from this action plan to your activity’s own planning documents e.g., action plans, risk registers, benefits maps**

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|  | **Possible Positive Impact on Groups** Include relevant data if possible | **Possible Negative Impact on Groups** Include relevant data if possible | **Actions Required** | **Responsible Person** | **Target date** | **Success indicators** | **Progress to date** |
| **All** (possible impacts affecting many groups) | Greater transparency and consistency in workload allocation creating a fairer distribution of duties across staff. | Uncertainty exactly what the impact would be on staff members. Anxiety about fairness and equity of allocations, perception of bias if transparency is not clear. Change can be a source of stress for those who may have a level of uncertainty on their personal impacts due to the changes. | Engage staff in a range of activity in relation to determining and assigning value, including but not limited to surveys, workshops and university wide open forums.  Clear comms campaign emphasising key changes, reasoning behind these and worked examples to help people understand personal impact.  Building model review into the governance, as the model will need to be continually improved based on feedback to be most effective. | Project Lead, HR, Comms | Go-Live | Staff feedback indicates allocations are understood, low number of informal grievances. Few formal challenges. | Comms plan is being developed, currently almost ready to send out initial surveys. |
| **Age** (older people, younger people) | Early career academics may benefit from fairer workload protection and older staff may benefit from clarity around roles and expectations. | Older staff may find new system digitally challenging. Early career staff may perceive model as limiting opportunities to take on more role elements. | Provide mixed-media training (video, drop-ins, written guides). For early career staff, line managers and supervisors will have a responsibility to set expectations and build support networks. | HR, Academic Careers Framework Team. | Pre-launch | Training attendance, staff providing positive feedback on usability, staff numbers making allocations correctly within the period. | Training plan under development. |
| **Disability**, including mental health and non-visible disabilities | Model allows for capturing reasonable adjustments. Improved consistency in re-allocations. | Risk that adjustments are not recognised or hours are not allocated fairly, potential backlash if not transparent around how we consider reasonable adjustments. | Build in formal process for recording and representing adjustments, ensure awareness around risks and need for sensitive handling by allocators. | HR, Allocators, EDI | Ongoing | Staff with reasonable adjustment report positive feedback of process and adjustments. | Flagged as area of importance to project team, currently planning how to build this into model. |
| **Women and men** | Opportunity to monitor gender workload distribution for fairness. | Risk of unconscious bias in allocation. | Bias training for allocators, gender split reporting. | HR, Allocators, Training | For release | Gender balance is monitored and acted upon if inequalities arise. | Training material in development, to explore if current bias training can mitigate issues. |
| **Trans and non-binary people**, including gender reassignment | Opportunity to include pronoun capture and non-binary identity fields if/how they are included in HR data feed. | Risk of misgendering or inappropriate display of sex/gender data. | Review system data fields, turn pronouns to optional or off if available, system should hold and display no unnecessary sex or gender fields. | IT, HR, EDI | Pre-Release | No formal or informal complaints of misgendering. | Query to be explored and resolved with vendor, however people data will not be manually entered into the system, this will be mastered and imported from the master data source. |
| **Marriage** and/or **civil partnership** | None identified | None identified | N/A | N/A | N/A | N/A | N/A |
| **Pregnancy** and/or **maternity**, including Adoption | Clearer mechanism to reallocate workload during leave; fairer treatment compared to previous more ad-hoc approaches. | Risk that returning staff receive disproportionate workload if leave/adjustments are not reflected, leading to stress or inequity. | Build policy for maternity/adoption into model and test policy for appropriateness. Ensure policy is shared and staff have awareness. | HR, Allocators, Project Team | Go-Live | Staff returning from leave report fair workload, minimal complaints or escalations. | Model process design in progress. Flagged to team. |
| **Race**, including ethnicity and citizenship | Transparent workload may help mitigate hidden bias in allocation. | Risk of unconscious bias still influencing allocators (e.g., assumptions about availability). | Allocator bias training, Anti racism training suite, review allocations by ethnicity. | HR, Allocators, EDI, Training | Ongoing | Monitoring shows no disproportionality. | Training under development. |
| **Religion and/or belief**, including those without religion and/or belief | Neutral – system focuses on workload not scheduling. | Neutral – system focuses on workload not scheduling. | N/A | N/A | N/A | N/A | N/A |
| **Sexual orientation** | Neutral | Data is not held, no risks. | Ensure data is not held. | IT, HR | Ongoing | No sexual orientation data is ingested by the system. | Need to confirm final dataset with Simitive when engagement kicks off. |
| **Other specific group** (e.g., International or Access) | International staff may benefit from consistency of allocations across schools and ability to look at model to understand more easily. | Risk of misunderstanding due to language or terminology, potentially different contract and workload allocation approaches than used to. | Provide clear guidance and FAQs for international staff. | HR, Comms | Pre-Launch | Positive feedback from international staff. | To be included in comms plan. |

Project manager next steps

Does this Equality Analysis require consultation of 3 or 6 weeks ([chart to help you decide](https://docs.uwe.ac.uk/sites/equality-and-diversity/Documents/Equality%20analysis/Equality%20Relevance%20Chart%20for%20Equality%20Analysis%202019.docx)) **6 weeks**

Is further monitoring or engagement required? (In addition to the formal Equality Analysis consultation, e.g., with the Students’ Union, Disability Services, relevant staff groups) **Yes – Presenting at Staff Networks who have an opportunity to consult prior to formal consultation.**

What measure / statistic / data will you use to check if the activity has had a positive, negative, or neutral outcome? **Feedback from stakeholders.**

When will you review this Equality Analysis? Enter date or project stage suitable to the proposal: **We will consider feedback in an ongoing nature to inform development and improvement of the model and project.**

Equality, Diversity, and Inclusivity Team Review

The EDI Team has reviewed this Equality Analysis and is satisfied that it is ready for formal consultation

EDI representative: Date:

Faculty/Service/Departmental Sign off

I am satisfied with the results from investigation, consultation, and analysis. The progression of this EA will continue to throughout the activity/project and I will ensure that a review is undertaken following the final implementation of the proposal, to assess its actual impact. Any actions or feedback that results as a consequence of ongoing project changes will be monitored and incorporated within the stated processes. Any negative outcomes will be resolved with the appropriate stakeholders identified.

Faculty Dean/ Head of Department/ Head of Service:

Faculty/ Department/ Service:

Date:

So what?

Consultation and engagement feedback is extremely important in Equality Analysis. Listening to student and staff voices and acting on their feedback mean that activities become fit for purpose for diverse student and staff communities. Complete the ‘You Said, We Did’ table **before and after formal consultation**, and throughout the remaining lifetime of your activity to show the impact of feedback on your activity. The Equality and

Diversity Unit will be in touch to gather examples of this feedback to share with equality stakeholders. Please add additional rows to the table as

required.

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| --- | --- |
| **You said** | **We did** |
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**Please forward an electronic copy to the EDI Team by emailing** [**edi@uwe.ac.uk**](mailto:edi@uwe.ac.uk)

**The original signed hard copy and/or electronic copy should be kept with your team for actions,**

**review, and progression of Freedom of Information requests.**