

## **Local agreement with SACO on working hours for teaching staff at Lund University.**

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### **Aim**

The working hours for teaching staff are to be arranged in such a way as to enable high quality education and research and to allow the organisation to develop and change according to its needs and the demands placed on it. The present agreement also aims to create good working conditions for the University's teaching staff. The objective should also be to achieve a balance in the distribution of working hours over the calendar year.

Management at all levels, employed teaching staff, other staff and the employee organisations share the task of achieving a favourable work situation and a good work environment. However, department management/equivalent teams have a particular responsibility for these issues through their direct leadership of the work. Creating good working conditions ensures favourable long term conditions for student learning, efficient and competitive research, individual professional development and an expedient administration.

Workforce management is to be based on a realistic assessment of the time actually required to complete various duties satisfactorily. In the follow-up and evaluation of activities, particular attention is to be paid to the allocation of work in order to improve workforce management.

### **Section 1 Authorisation**

The agreement is concluded on the basis of Chapter 1 Section 4 of the General Agreement on Pay and Benefits (ALFA-T) with Appendix 5.

### **Section 2 Area of application**

This agreement applies to teaching staff and, in applicable parts, to certain other positions (see below) at Lund University, which are covered by ALFA-T.

The agreement replaces the provisions in ALFA-T, Appendix 5 and in Chapter 4 of ALFA-T with the exception of Sections 1-3. However, should the parties be unable to negotiate acceptable terms for a new agreement, ALFA-T, Appendix 5 is to be applied.

Teaching staff is defined according to the University's rules and regulations for academic appointments, Section 1 (Reg. no LS 2010/771).

With the reservations stated in the present agreement, the Higher Education Ordinance or other relevant legal documents, the working hours in this agreement are also applied to the following positions: teaching assistants (who lecture), clinical assistants, doctoral students and assistants with doctoral grants.

### **Section 3 Annual working hours (per calendar year)**

The total annual working hours are:  
1700 hours for employees with 35 days' annual leave (from the year in which the employee turns 40)

1732 hours for employees with 31 days' annual leave (from the year in which the employee turns 30)

1756 hours for employees with 28 days' annual leave (employees up to the age of 29)

All duties attributed to teaching staff are to be included in the working hours indicated. The time dedicated to appointments such as head of department and director of studies is not regulated in the present agreement. This is regulated in the individual agreement reached on the appointment in question.

#### **Section 4 Allocation of duties**

The starting point for the allocation of the annual working hours for teaching staff is for the organisation to make the most of available resources and to achieve a good balance between the various duties and different categories of teaching staff. Another aim is to achieve a balance in the distribution of the annual working hours over the calendar year.

In cases where the extent of different duties may vary over time, the allocation of duties (duties plan) can be set out in a documented multi-year plan covering a maximum of three years and within the applicable period of employment. In this perspective, all teaching staff is assumed to be able to contribute to first- and second-cycle education.

If the allocation of duties is done over a shorter planning period, which must, however, cover at least one year, the extent of the duties cannot be distributed over several calendar years. Regardless of the time frame used in the planning process, the working hours cannot exceed the limits set out in Section 3.

In addition to teaching duties, time is to be allowed for research, educational and artistic development, professional development and opportunities to follow developments within one's own subject area. Administrative duties can also be included.

Time for research is normally only given to teaching staff with research qualifications, that is those who hold a PhD degree or who are considered to be equally qualified in some other way. Lecturers admitted to third cycle studies should also be given time for research.

Teaching staff within artistic fields shall usually be given time for artistic development work.

In the planning of working hours, particular attention is to be paid to leadership duties in education and research both within the subject and beyond. The same principle applies to responsibility as a principal or assistant supervisor of third cycle students. See also Section 3, second paragraph.

As guidelines for the allocation of work duties, the following apply:

##### ***Professor, visiting professor, adjunct professor***

Professors shall normally dedicate the majority of their working hours to research and to the teaching and supervision of research students. Professors should also take part in teaching first and second cycle students.

##### ***Senior professor***

The work duties of senior professors are regulated by a separate agreement. Senior professors shall normally dedicate the majority of their working hours to research. Senior professors can also take part in teaching first and second cycle students, as well as teaching and supervising research students.

***Senior lecturer***

Senior lecturers shall normally dedicate their time to both teaching and research.

The proportion of working hours used for education shall normally amount to a maximum of 70% of the planning period on average. Other duties should normally amount to at least 30 % of their working hours of which at least 20 % are to be spent on research and professional development.

***Postdocs, assistant senior lecturers, postdoctoral research fellows***

Postdocs, assistant senior lecturers and postdoctoral research fellows are to dedicate the majority of their annual working hours to research.

Opportunities are to be provided for higher education teacher training and to be active within first and second cycle education in order to qualify for employment as a senior lecturer and professor (see the University's rules and regulations for academic appointments, Section 22).

***Lecturers***

Lecturers are normally to dedicate the majority of their annual working hours to teaching.

The proportion of working hours used for education shall normally amount to a maximum of 80% of the planning period on average. Other duties should normally amount to at least 20% of the working hours of which at least 10 % are to be used for professional development, including research studies where relevant.

**Section 5 Professional development**

Over a period of several years, each member of teaching staff is to be guaranteed time for individual professional development. This is to be planned and documented in consultation between the employee and the employer and can either be combined to cover extended periods or structured more continuously over the planning period.

Teaching staff are to be encouraged to acquire qualifications. To the extent that it is financially possible, teaching staff are to be provided with opportunities for recurring extended periods for research, third cycle studies or professional development. Time is also to be set aside for higher education teacher training as required.

A plan for professional development is to be drawn up for each member of teaching staff unless there are particular reasons not to do so. A professional development plan usually covers several years. The resources set aside for professional development are to be used in a way that is consistent with the plan, to enable the intended positive impact for the organisation and the employee.

The staff appraisal is to include a follow-up and revision of the professional development plan.

**Section 6 Duties plan**

The planning of annual working hours is to be done in consultation with the member of teaching staff concerned. This dialogue is an important condition for a good work environment. The University's mandate, the needs of the organisation, its financial situation and a holistic view of the employee's duties and work situation are all to be taken into consideration.

The planning is to be done for each calendar year and is to result in a duties plan for each member of teaching staff, based on the department's aims, its educational and research assignments and a holistic approach to the employee's research, teaching and other skills. The allocation of work is to take into account the need of teaching staff to balance the duties that are part of their current position and their need for professional development.

The duties plan regulates the extent and content of the duties, i.e. their amount and structure within teaching, supervision, research or artistic development work, professional development and other work such as administrative duties, participation in planning and evaluation, management of certain activities or cooperation with wider society. The time assigned to various duties is to be indicated in a number of hours that in total correspond to the relevant annual working hours.

The decision on the extent and distribution of duties is to take into account the nature and level of difficulty of the duties as well as the employee's skill and experience within the relevant subject areas and the funding conditions of the various work assignments. When a change to a duties plan is required, it is to be implemented in consultation with the employee concerned and is to take account of the wishes of the individual employee.

There are variations in the methods of teaching between different disciplines and concepts such as class tuition can mean different things within different parts of the University. One consequence of this is that it is difficult to establish a general method for calculating the time required for different types of teaching. The calculation of the time an individual member of teaching staff is required to participate in teaching must take account of the structure and methodology of the teaching and examination, the level of difficulty of the course and both preparatory and follow-up work.

The basis for the allocation of teaching duties is that an hour of teaching (45 minutes), including preparatory and follow-up work, requires 2-7 actual hours of work. For lectures/classes a factor of 4 is usually applied, with a minimum factor of 3. When examination is included, the lowest applicable factor is 4. For the artistic field, other conversion factors can be used.

Teaching staff who mainly have teaching duties are not to be allocated more such duties than those allowed in the general regulations which previously applied to this type of position (see ALFA-T, Appendix 5, Section 5).

The individual duties plan is to be set up in good time, documented and approved by the head of department/equivalent.

### **Section 7 Presence in the workplace**

Teaching staff are to be present in the workplace to the extent required by the organisation's activities and their own duties. The access of other teaching staff and students to contact with the individual member of teaching staff, e.g. through reception hours, is also to be considered. In order to contribute to the development of the activities, to a good work environment and good study conditions for students, teaching staff are to participate in meetings and activities arranged or implemented by the department/equivalent.

Teaching staff who will be absent from the workplace at other times must notify the head of department of the address where they can be reached, if they are not reachable at their usual home address.

### **Section 8 Overtime and additional hours**

The duties of teaching staff are to be planned in such a way as to allow all duties to be completed within the annual working hours. Additional hours or overtime beyond the total annual working hours should not normally occur. Additional hours or overtime are to be requested or subsequently approved by the head of department/equivalent.

If special needs arise to carry out certain unplanned duties, a reallocation of duties is to be done first. If, during the calendar year, special needs arise for teaching staff to carry out duties beyond those planned within the framework of the annual working hours, the head of department has the right to request additional working hours up to a maximum of 175 hours, or overtime up to a maximum of 150 hours, per calendar year. The maximum number of hours of additional working hours and overtime is calculated per calendar year. In any calendar year, the additional hours and overtime done by a member of teaching staff must not exceed 200 hours.

Additional hours and/or overtime are normally regulated once a year in connection with the annual closing of accounts, but should be checked at the end of the spring semester in case measures need to be taken before the autumn semester.

Teaching staff who are on partial sick leave, partial statutory leave or leave for the care of a child are not obliged to work additional hours or overtime. Teaching staff who are partially retired are obliged to work a maximum of 25 additional hours and a maximum of 25 hours of overtime per calendar year.

Doctoral students, teaching assistants with doctoral grants, teaching and clinical assistants cannot be assigned overtime work.

No compensation for additional hours or overtime is paid out for working hours spent on research, research studies, professional development or individual artistic development, which teaching staff themselves have at their disposal.

Compensation for overtime is paid in the form of money (overtime pay) or in the form of leave (compensatory leave) at the latest within the following calendar year. Compensatory leave is given if the employee so wishes and the head of department deems it possible with regard to the needs of the organisation.

For the calculation of pay for additional hours/overtime or compensatory leave, the rules in ALFA-T, Chapter 4 Sections 11-12 and 23-24 apply.

### **Section 9 Evening and weekend teaching**

A supplement is paid for teaching in the evening after 18:00 and for teaching on Saturdays and Sundays according to the current local agreement on hourly pay for teaching and for teaching in the evenings and on weekends.

### **Section 10 Annual leave**

In addition to what is stipulated in the Annual Leave Act, the following is to be applied to the issue of annual leave.

Annual leave is to be taken consecutively in the summer, starting on the first Monday after Midsummer, unless the head of department and the individual employee have agreed otherwise in writing, well in advance of the start of the annual leave. This provision does not apply to doctoral students, assistants with doctoral grants, teaching assistants and clinical assistants.

### **Section 11 Annual working hours in the case of sick leave and other authorised leave**

In the case of sick leave and other authorised leave, the annual working hours are reduced in relation to the extent of the sick leave or other leave of absence. If possible in such cases, the individual duties plan is to be rearranged so as to minimise the consequences for the organisation as well as for the employee concerned.

### **Section 12 Rules of negotiation**

The duties plan is to be drawn up in good time before the start of the calendar year and employees are to be informed at the latest two weeks before the local employee organisations are notified. Teaching staff have the opportunity to discuss their duties plans directly with the head of department or to contact their employee organisation.

Before the decision is taken on the duties plan, it is to be submitted to the local employee organisation concerned. If the local employee organisation does not request a negotiation within the deadline indicated below, the employer is free to take a decision on the duties plan. If the employee organisation calls for negotiations within ten working days of reception of the plan, the following provisions apply.

In the case of disagreement between the head of department and the local employee organisation on the application of this agreement, the head of department is to refer the matter to the dean. If no agreement can be reached between the dean and the local employee organisation, the matter is passed on to the University administration. Until the matter has been negotiated at the faculty level or within the University administration, the head of department is authorised to take interim decisions on the matter in emergencies.

This obligation to negotiate and inform replaces the employer's obligation to negotiate and inform according to the Swedish Employment (Co-Determination in the Workplace) Act (MBL).

### **Section 13 Validity**

The present agreement applies as of 1 July 2012 and until further notice under the period of application of ALFA-T, with a three month notice period. The provisions on duties plans in the agreement will be applied for the first time to the 2013 calendar year.

Lund University

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