

# Workload management

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A guide for employees | September 2017



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## Introduction

### Purpose of the guide and how to use it

The Queensland Government is committed to working with employees to improve the health, safety and wellbeing of all our people – creating work environments and practices that help our people live productive working lives.

The Workload management guide (guide) has been developed under the *State Government Departments' Certified Agreement 2009* to assist employees work with their manager to design work practices that promote wellbeing, work-life balance and prevent harm.

The guide can also be used to build your capability and improve outcomes and performance.

We all have a shared responsibility to make the Queensland public sector (sector) a great place to work.

As business units vary in what influences their workloads there is no 'one-size fits all' approach to managing workload issues, and a locally tailored approach is needed to identify and address specific issues. This guide is just one tool that may be used to support business and operational planning activities. It does not define what is or is not a reasonable workload.

When choosing to use this guide, you are encouraged to modify the contents to suit your agency or department and the business and project planning processes. This should be done in consultation with the Agency Consultative Committee (ACC).

## Workload management guide

This guide has been updated to reflect the *State Government Entities Certified Agreement 2015 (Core EB)* but is otherwise consistent with the guide developed by a joint working party of government and public sector union representatives pursuant to Part 16, clause (4) of the *State Government Departments' Certified Agreement 2009*.

Part 16 of the Core EB provides:

1. The Queensland Government is committed to working with its employees and the public sector unions to address workload management issues. It is acknowledged that high workloads can in some circumstances lead to unsafe work practices, therefore entities should ensure safe work environments are not compromised, and that entity responsibilities under legislation including duty of care to all employees are complied with.
2. It is recognised by the employer that unrealistic expectations should not be placed on employees by line management to consistently perform excessive working hours whereby no opportunities arise to utilise accrued time or time off in lieu (TOIL).
3. Entities are obliged to consider the impacts on workloads when organisational change occurs, particularly those impacts arising from the introduction of new programs and from machinery of government changes. Management at the local level should undertake appropriate consultation with affected employees when implementing organisational initiatives including machinery of government changes that may have an impact on the workloads of affected employees.

4. The Queensland Government remains committed to the implementation of the workload management tool during the life of this Agreement. In utilising the workload management tool, entities are obliged to adapt the template tool to account for entity-specific circumstances to ensure easier application of the tool.
5. In addition, the parties agree that each Consultative Committee (CC) will deal with the issue of workload management. The activities of the CC in workload management should include, but not be limited to, the following:
  - To undertake research on local workload management issues.
  - To address specific workload issues referred by staff of work units, union officials and/or management.
  - To develop expedient processes for referral of workload issues to the CC.
  - Based on research, develop strategies to improve immediate and long-term workload issues.
  - To assess the implications of workloads from a workplace health and safety perspective and refer relevant matters to the workplace health and safety committee.
  - To consider the impacts on workloads when organisational change occurs, particularly those impacts arising from the introduction of new programs and from machinery of government changes, and make recommendations to affected workgroups on the management of potential workload issues where appropriate.

## Principles of good workload management

Effective workload management requires:

- Understanding that both employees and managers are accountable for effective workload management.
- Employees and managers to understand and accept that in each workplace there can be natural peaks and troughs in terms of workload associated with achieving service delivery requirements.
- Recognition that changes occur in workplaces on a daily basis and that managers are responsible for managing workloads.
- Understanding that workload management forms part of normal business and project planning processes.
- Workload allocation and prioritisation that supports strategic priorities and links to business, operational and workforce planning processes – in addition to individual performance management processes.
- Decisions that consider the work-life balance of employees.
- Equitable distribution of workloads and open and transparent decision making.
- Recognition that employees should not be required to undertake work that significantly and regularly exceeds ordinary working hours, unless exceptional circumstances exist (such as an urgent or unexpected high-volume of work of a short-term nature, and/or for a specified time period; or where there are critical community service requirements for example, emergency management services).
- Allocation of workloads that consider the training, skill, knowledge, career and professional development of individual employees.
- Maintenance of safe work environments, safe work practices, and adherence to workplace health and safety legislation/policy.
- Active consideration of future workforce initiatives such as flexible work arrangements, employee health, safety and wellbeing and the impacts of organisational change such as workforce renewal and voluntary redundancy.

- Compliance with industrial legislation, awards and agreements – including hours of work and remuneration provisions.
- Workload management informed by effective identification and analysis of data/information and accurate and consistent performance reporting within the context of the business function.
- Processes undertaken and information collected as part of workload management consider the privacy of, and confidentiality of issues raised by, individual employees.
- Flexibility and discretion is maintained in applying workload management to ensure local and business area needs are met.
- Issue escalation processes and dispute resolution mechanisms are in place.

## Processes for resolving a workload management issue

### Signs of a possible workload management issue

The most common issue relating to workload management is the concern that workloads are too high, but there could also be problems that arise from workloads being inconsistent, inequitably distributed or even too low.

If you feel there is a workload management issue in your workplace that is not being addressed as part of day-to-day business, you are entitled to raise those concerns and have the issue looked into.

The need to examine workloads can be raised by an individual employee, group of employees or within a work unit, a supervisor or line manager, or in some circumstances by someone external to the local work unit, such as a senior management board or a client.

Making sure all employees have workloads that are reasonable is part of the day-to-day responsibility of supervisors and managers.

From time to time, circumstances will arise that will generally prompt a re-examination of how work is managed and allocated within the team. This might occur as part of the usual business or operational planning cycle, or in response to a specific event.

Circumstances within the workplace that indicate that workloads may need to be reviewed include, for example:

- Introduction of new programs or work.
- Major organisational change, including staffing changes.
- New or revised business or strategic plans.
- Changes to, or reprioritisation of services.
- Changes in the external environment such as legislative changes, introduction of new professional or qualification standards.
- Budgetary/economic factors.
- Changes within the work unit's client base.
- Developments in community expectations.
- Failure to achieve work unit goals or targets.
- Increase in unplanned absences.
- High levels of recreation leave accruals.
- High rates of overtime.
- High levels of accrued ADO and/or TOIL.

- Outcomes of staff opinion or health and wellbeing surveys.
- Increased numbers of complaints (internal and/or external).
- Above average staffing turnover.

## How to raise an issue relating to workload management

Issues relating to workload management should be raised directly with your supervisor or line manager in the first instance.

It is important that your manager is given details as well a reasonable opportunity to respond to your issues first before they are escalated outside your workplace. This is because workload management is the manager's responsibility and any other party to whom you raise your concerns will need to know what your manager knows of your concerns, and what steps they have taken to resolve them.

In raising your issues, it is recommended that you address where possible the following factors:

- Why you believe there is a workload issue in your workplace – that is, what gives you reason to think there is an issue, and why you think the problem is one of workload.
- Are there objective signs or indicators (like the examples in the previous section) you can point to that support your view that workload needs to be looked at?
- Is there evidence that you can collect to support your view, or evidence that you might not have access to but that your supervisor or manager should have reference to?
- Are there particular steps that you think could be taken that would resolve the issue?

## What happens once an issue is raised?

Firstly, a detailed analysis should be carried out to develop a complete understanding of the nature of the workload issue. You may be asked to be involved in this process, depending on your level of knowledge of the identified factors. For specific details about the analysis process, refer to Workload management: a guide for managers.

The next step is to determine a range of options for responding to the workload management issue, and to develop processes for implementing these options.

You can provide a unique and valuable perspective to assist your manager to develop appropriate options for dealing with workload management issues. However, it is important that you remember that your manager will need to consider a broad range of strategic and operational issues which will also impact on his/her decisions.

For example, the following may need to be considered when developing options for resolving workload issues:

- What level of approval is required?
- What will it cost (for example, human or financial resources)?
- Has there been an appropriate level of consultation amongst affected staff?
- How will this affect our other stakeholders?
- What impact does it have on clients or the community?
- Do the potential options meet legislative, policy, financial and/or cultural requirements relating to the work area and agency?
- Are external sources of expertise or advice required to develop the options?

Prioritise options into an action plan and once it is approved by the appropriate person, the options will need to be implemented in a planned, coordinated, effective and efficient manner. The implementation process is outlined in Workload management: a guide for managers.

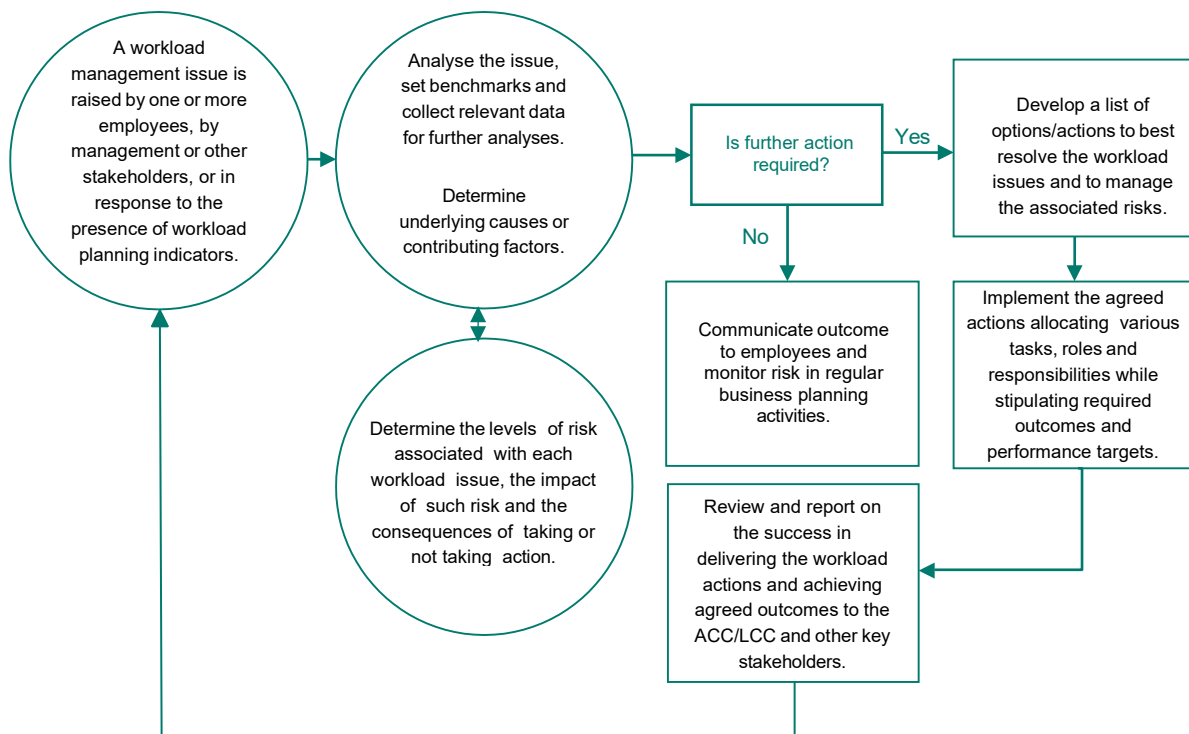
During the implementation process, your manager will have regular discussions with you and your colleagues about various issues surrounding the actions being implemented. Once again, your detailed knowledge of operational matters will be able to assist management during the implementation phase, so it is important for you to take a positive and proactive approach to working with your manager/supervisor during this phase.

Sometime after the action plan has been implemented an assessment will need to be undertaken to determine how effective and successful the actions have been in addressing the workload management issues. To achieve this, a review and reporting process will be undertaken (refer to Workload management: a guide for managers). There are options around who may be responsible for undertaking the review – it could be the line manager themselves, a small working group within the respective work area, another manager, an ACC/local consultative committee (LCC) or an external third party.

You may be asked to participate in the review, either as a member of the review team or by providing feedback to the reviewer about the outcome of the process. Either way, it is important that any feedback you provide is constructive and provides alternative solutions where appropriate.

### Process flow chart

The following flow chart outlines the process steps for workload management.



## Escalation

If you continue to experience workload issues and have not been able to resolve these issues at a local work level after considering the options presented previously, you are entitled to escalate the issue.

Escalation can be:

- Via an informal basis, by raising concerns with your local level supervisor/manager (preferred first option).
- Via the unresolved workload issue identification form - for employees (Attachment A) or equivalent within an agency should be completed and submitted to your relevant ACC/LCC.

To escalate the issue, you will need to be able to provide information in relation to the following questions:

- Have you raised the issue previously with your manager/supervisor?
- What actions may have been taken previously to rectify, resolve or address the issue?
- What were the outcomes of previous action i.e. what level of success occurred?
- What has been the cause or contributing factors?
- Over what time frame has workload been an issue?
- What evidence or supporting data is available?

The ACC/LCC within your agency may recommend that:

- Action be taken at a local work level between your manager/supervisor and yourself/your work colleagues as a preferred first option.
- Other relevant actions are taken to progress the issue.

### Further information or assistance

If you require any further information or assistance, you can contact your agency's human resources branch, your ACC, your union, or the Employee Assistance Provider.



# Appendix A

## Unresolved workload issue identification form – for employees

An employee, or a group of employees, who are experiencing workload issues, AND have not been able to resolve the issues at the local level should complete this form and forward it to their supervisor or to the relevant Consultative Committee. The manager can also forward the form to the relevant Consultative Committee.

All workload issues identified will be considered and feedback provided.

**Employee's or employees' name(s):**

**Work unit/department:**

**What is the workload issue and its impact on you or your team?**

(i.e. loss of TOIL, increased sick leave, increased client complaints etc.)

**Please attach any supporting data.**

(This section must be completed)

**What are the timeframes during which workload has been a concern?**

\_\_\_\_ / \_\_\_\_ / \_\_\_\_ to \_\_\_\_ / \_\_\_\_ / \_\_\_\_

Have you raised this workload issue before with your line manager/supervisor?

Yes       No

If yes, what actions were previously taken by you and your line manager/supervisor to rectify, resolve or address the issue? How successful were they?

Action taken	Outcome

**Do you have any additional suggestions to resolve the workload issue?**

**Indicate below what you understand to be the cause(s) and contributing factors of the workload issue:**

Please tick all that apply:

- Positions not filled
- Capability of staff
- Increased volume of work
- Equipment not available
- Involved in training of new staff
- Change of duties, procedure or policy
- Correct procedures not followed
- Non availability of casual staff
- Other (please specify):

Employee/s signature:

Date:

Supervisor's signature (optional):

Date:

I acknowledge that reasonable attempts have been made to address this workload management issue at a local level.



# More information

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