Workload Management

A Detailed 5-Step Process

McGill

MHW

MY
HEALTHY
WORKPLACE

at the heart of
what matters

Workload & Wellness

Effective workload management is critical in supporting the psychological wellness of an employee.

There is a unique relationship between job demands, intellectual demands and job satisfaction.

Psychosocial Factors and Workload Management

- Psychosocial factors are elements that impact employees' psychological responses to work and work conditions, potentially causing psychological health problems.

- Psychosocial factors include the way work is carried out: deadlines, work processes, workload, work methods

- Psychosocial factors also include the context in which work occurs, including relationships and interactions with supervisors, colleagues and clients.

Effective Workload Management Guidelines

- Both supervisors and employees are accountable for effective workload management.

- Employees and supervisors should understand and accept that in each workplace there can be natural peaks and troughs in terms of workload. Best to anticipate and plan for peak periods, when possible.

- Changes occur in workplaces on a daily basis and supervisors are responsible for distributing the work equitably.

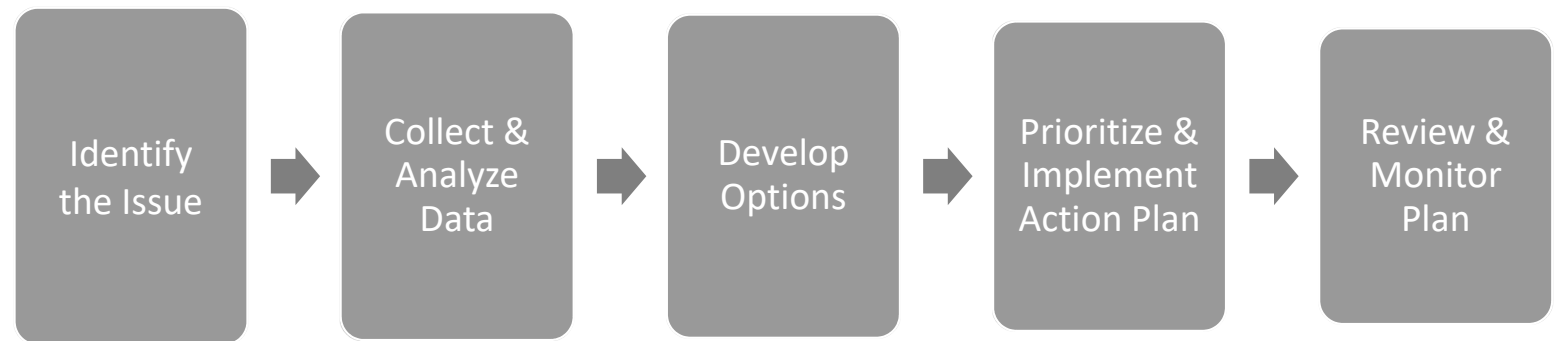- Decisions are made with the work-life balance of employees in mind.

Effective Workload Management Guidelines

- Supervisors should ensure that employees are not 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 e.g. emergency management services).

- Allocation of workloads should take into account the training, skill, knowledge, career and professional development of individual employees.

- Safe work environments, safe work practices, and adherence to My Healthy Workplace Guidelines are essential.

Effective Workload Management Guidelines

- Alternatives such as flexible work arrangements should be considered.

- Workload management should be informed by effective identification and analysis of data/information and accurate and consistent performance reporting within the context of the unit/department's function.

- Information collected as part of workload management must take into account the privacy of, and confidentiality of issues raised by, individual employees.

Process for resolving workload management issue

Identify the Issue → Collect & Analyze Data → Develop Options → Prioritize & Implement Action Plan → Review & Monitor Plan

Identify the Issue

Workload issues may be identified in a number of ways:
- By an employee or group of employees.
- By a supervisor, line manager, senior manager, board or a client.
- As part of the operational planning cycle.
- In response to major organizational change.
- Unexpected peaks in work.

Collect & Analyze Data

- This approach is most effective when a number of relevant indicators are available.

- Recommended that data be collected over a representative period of time.

- Existing systems and processes support the collection of the data.

Data Analysis Considerations

- What factors, underlying causes, problems or trends are contributing to the workload issue?
- Are these factors temporary or ongoing? Cyclical in nature?
- To what extent are these factors within the control of management, of employees and/or of the unit/department generally?
- What is the relative experience, capability and capacity of individuals within the team?
- Does task completion hinge on any interdependencies within or beyond the team (e.g. data required by others)? If so, do data consider collected capture waiting times…?
- Is there relevant historical and/or empirical data available that could help put a particular indicator in context?

Exploring Options

In some cases, the issue may be resolved at a local level, may be incorporated within business as usual monitoring or may prove not to be a problem. Relevant considerations when developing options include:

- What is the scope of the option (i.e. is it a local level application or beyond to potentially an across University scope)?
- Given the scope of the option, what levels of and mechanisms for approval of the option are required?
- What is the potential impact on the existing workload within the work area, both at point of action and in an ongoing manner?

Exploring Options

- Is reprioritization of services or work performed by the unit a viable option?
- What can be done differently in order to alleviate the workload?
- Which non-value added activities can be eliminated?
- Is there the current capability or capacity to implement the option, and if not how might this capability/capacity be achieved?
- Are the options realistic, achievable, practical or viable?
- Has there been an appropriate level of consultation amongst affected staff?

Exploring Options

- What level of involvement and/or impact does the option/s have on 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 unit/department?
- Are external sources of expertise or advice required to develop the options?

Prioritize & Implement Action Plan

When prioritizing options, consider the following factors:

- An allocation of resources e.g. financial, human, equipment, accommodation.
- An identification of the key stakeholders.
- Minimization of impact on clients and any other key stakeholders.

Prioritize & Implement Action Plan

When implementing an action plan, ensure the following:

- A set of tasks or procedures to implement the approved actions.
- Some agreed timeframes to implement actions.
- A set of performance measures and agreed evaluation mechanism.
- Consultation and communication processes, both internal and external.

Review & Monitor Plan

Workload management activities and actions need to be reviewed to ensure a safe and healthy work environment and continued achievement of desired deliverables. Factors to consider in the review and monitoring step:

- Effective record keeping and documentation of actions and decisions is vital.
- Performance targets/measures/benchmarks need to be incorporated into the review and understood by all parties.
- Accurate and relevant data (both quantitative and qualitative) needs to be used.
- Apply objectivity and impartiality.