

Workload Assessment

First Produced:	29/09/00	Authorisation:	Te Kāhui Manukura
Current Version:	07/02/17	Officer Responsible:	Director Corporate Services
Past Revisions:	10/11/00, 13/09/02, 05/05/06, 29/07/09, 11/12/12		
Review Cycle:	3 year cycle		
Applies From:	Immediately		

Major changes/additions since the last version was approved are indicated by a vertical line in the left hand margin

1 Introduction

1.1 Purpose

The purpose of this policy is to provide the principles and procedures for analysing and assessing workload at Ara.

1.2 Scope and Application

This policy relates to the Ara commitment to be recognised as a high performing organisation with staff capacity and educational capability to operate as a responsive, progressive and sustainable organisation.

1.3 Formal Delegations

As specified in the People and Development Delegations Schedule.

1.4 Definitions

These definitions apply within the context of this policy, specifically in relation to the Principles.

- a **Equitable** (Principle 2.1): Equitable means that staff with comparable responsibilities should have similar workloads. The greater the similarity of positions the more strongly this principle applies.
- b **Reasonable** (Principle 2.2): Reasonable means the workload can be managed within the stated timeframes and deadlines, and that staff will be able to maintain a balance between their professional and personal life. Fluctuations will occur within a reasonable workload.
- c **Safe** (Principle 2.3): Safe means that the amount of work does not cause and/or contribute to mental, physical or emotional harm to the staff member, their colleagues or the students for whom they are responsible. This includes consideration of stress and OSH requirements.
- d **Develop** (Principle 2.5): Develop means enhance professionally - in content/discipline area teaching skills and in aspects that require change/upgrading in skills and/or abilities. It also includes development as a person.

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<p>Related Ara Procedures</p> <ul style="list-style-type: none"> • CPP120b People and Development Delegations Schedule 	<p>Related Ara Policies</p> <ul style="list-style-type: none"> • CPP214 People and Development Management • CPP216 Leave Management • CPP501 Health and Safety
<p>Related Legislation or Other Documentation (Infoweb)</p> <ul style="list-style-type: none"> • TEU Collective Employment Agreement • AASC Collective Employment Agreement • TIASA Collective Employment Agreement • Other CEAs • Individual IEAs 	<p>Good Practice Guidelines (Infoweb)</p> <ul style="list-style-type: none"> • Workload Packages for Allied Staff, Academic Staff and Managers
<p>References</p> <p>Management and staff may seek further advice regarding workload processes from:</p> <ul style="list-style-type: none"> • their immediate supervisor • the designated HR Business Partner for their area • People and Development • the Infoweb 	
<p>Notes</p> <p>This policy, the guidelines and the workload packages were first introduced at the end of 2000 and the policy confirmed in 2002. The guidelines and workload packages will be reviewed separately.</p>	

2 Principles

- 2.1 Total workload must be equitable.
- 2.2 Total workload must be reasonable.
- 2.3 Total workload must be safe.
- 2.4 All aspects of workload must be taken into account in allocation of work.
- 2.5 Workload must be such that it allows the individual to continue to develop.
- 2.6 Workload must be considered as an element of all change, development and programme planning.

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3 Associated procedures for Ara Corporate Policy on: Workload

Contents:	3.1	Process
	3.2	Assessment and Analysis
	3.3	Meeting / Negotiation Heading
	3.4	Follow-up

3.1 Process

- a The workload analysis and assessment process may be applied in two sets of circumstances: when work is being allocated or re-allocated and when a workload issue for an individual staff member is identified.
- b Staff who are members of any union that has a CEA with the institute e.g. TIASA, TEU or AASC, may approach their staff association for assistance at any or all stages of the workload assessment/analysis and negotiation process.
- c When staff members initiate a workload assessment, they will negotiate a time to meet with the relevant manager. For academic staff this will be the Head of Department or agreed delegate. For allied staff this will be the appropriate Manager, Head of Department or supervisor with delegated responsibility for workload allocation.
- d When a manager initiates a workload assessment, he/she will negotiate a time to meet with the staff member concerned, and ask him/her to complete the relevant parts of the relevant Workload Assessment Package in time for the meeting.
- e Other people, who could appropriately initiate a workload assessment, for an individual or for a work team, are the relevant manager or director with delegated responsibility for workload allocation, the Corporate Services Director and the Manager People and Development.
- f When anyone other than the staff member whose workload is being considered initiates a workload analysis/assessment, that person is required to provide reasons, which must include specific concerns that relate directly to the workload of the staff member.
- g When work is being allocated or re-allocated, managers will take into account the workload principles, and if necessary initiate a workload assessment and analysis, using the tools provided in association with this policy.

3.2 Assessment and Analysis

Assessment and analysis include consideration of organisational and individual factors that contribute to over/under workload, contractual requirements and other limits. The Workload Packages provide the tools for carrying out this analysis.

3.3 Meeting / Negotiation

A staff member and his/her manager meet and discuss the information provided by the assessment/analysis process. Guidelines for the meeting are included in the Workload Packages. Staff members who use the process and their managers will decide what documentation will be retained and by whom. Where workload has been identified as affecting the staff member's health and wellbeing then a record of the issues identified and actions taken must be kept and is retained on the staff member's personal file.

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3.4 Follow-up

Follow-up action by the staff member, the manager or both will be recorded, dated and reported back. Review dates are set to check that the actions have occurred and the outcomes are appropriate or alternatively other action is required.

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