

Workload Assessment

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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 Institute of Canterbury Limited (Ara).

1.2 Scope and Application

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

1.3 Formal Delegations

As specified in *CPP120c People and Culture Delegations Schedule*.

1.4 Definitions

These definitions apply within the context of this policy, specifically in relation to the principles as set out clause 2 below:

- a **Equitable** (Principle 2.1): Equitable means that colleagues 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 colleagues 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 colleague, their team members, or the learners for whom they are responsible. This includes consideration of stress and Workplace Health and Safety requirements.
- d **Develop** (Principle 2.4): Develop means enhance professionally - in content/discipline areas 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 Culture Delegations Schedule 	<p>Related Ara Policies</p> <ul style="list-style-type: none"> • CPP214 People and Culture Management • CPP216 Leave Management • CPP501 Health and Safety
<p>Related Legislation or Other Documentation</p> <ul style="list-style-type: none"> • TEU Collective Employment Agreement • AASC Collective Employment Agreement • TIASA Collective Employment Agreement • Other CEAs • Individual IEAs • Ara talent growth cycle • Capability Frameworks 	<p>Good Practice Guidelines (Waituhi)</p> <ul style="list-style-type: none"> • Workload Packages for Allied Staff • Valuable Conversations
<p>References</p> <p>Management and colleagues may seek further advice regarding workload processes from:</p> <ul style="list-style-type: none"> • their immediate supervisor • the designated People and Culture Business Partner for their area • People and Culture • Waituhi 	
<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 and psychologically 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 Assessment

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 colleague is identified.
- b Colleagues 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 colleagues initiate a workload assessment, they will negotiate a time to meet with the relevant manager. For academic colleagues this will be the Head of Department or agreed delegate. For allied colleagues 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 colleagues 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 Executive Director with delegated responsibility for workload allocation, and People and Culture Business Partners.
- f When anyone other than the colleague 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 colleague.
- 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 colleague and his/her manager meet and discuss the information provided by the assessment/analysis and/or workload allocation process. They may seek the assistance of a People and Culture Business Partner. All documentation in relation to this process will be retained on the colleague's employee file.

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3.4 Follow-up

Follow-up action by the colleague, 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.