

On the **Agenda**



Facilitator's Guide

Workload Management

Workload Management



Slide # 1

For this slide, you want to ensure that you have already introduced:

- yourself
- your role within the organization, if unknown to the group
- why you are engaging the group in this discussion
- the importance of addressing psychological health and safety in your organization

The importance of addressing psychological health and safety in your organization can be highlighted by stating the following:

1. Depression will rank second only to heart disease as the leading cause of disability worldwide by the year 2020, which can impact the workplace in areas such as bottom-line production and team work.
2. There are current and emerging legal requirements in Canada for the protection of employee psychological health and safety and the promotion of civility and respect at work.
3. Organizations that value and improve the health of the workplace can improve their organization profile. An improved profile can result in better recruitment and retention rates, enhancing the potential for growth. We want you and potential employees to know that we value your contribution to the organization, that you do good work and that we want to help you to continue to be successful at work.

After these statements, you might say: “The focus of this session is to discuss managing workload in the workplace”.

On the Agenda



Slide # 2

This slide provides a definition of managing workload in the workplace. We recommend starting with the proposed definition provided by *Guarding Minds @ Work*[™]: “Managing workload in the workplace means an environment where tasks and responsibilities can be accomplished successfully within the time available.” Then open the floor for questions about the definition. An idea to get employees to start participating in your presentation is to ask a volunteer in the audience to read the slide. You may wish to share additional information such as:

1. What does managing workload in the workplace mean?

Possible Answer: Research indicates that it is not just the amount of work that makes a difference in employee satisfaction and success, but also the extent to which employees have the resources (time, equipment and support) to do the work well.

2. Why is managing workload in the workplace so important?

Possible Answer: Workload management is important because there is a unique relationship between job demands, intellectual demands and job satisfaction.

About PF9: Workload Management

What are Psychosocial Factors?

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, workload, work methods) and the context in which work occurs (including relationships and interactions with managers and supervisors, colleagues and coworkers, and clients or customers).

What is PF9: Workload Management?

GM@W defines PF9: Workload Management as present in a work environment where tasks and responsibilities can be accomplished successfully within the time available. This is the psychosocial factor that many working Canadians describe as being the biggest workplace stressor (i.e., having too much to do and not enough time to do it). Research has demonstrated that it is not just the amount of work that makes a difference, but also the extent to which employees have the resources (time, equipment, support) to do the work well.

Why is Workload Management important?

Most employees are not only willing to work hard, but experience a 'good day's work' as fulfilling and rewarding. Workload management is important because there is a unique relationship between job demands, intellectual demands and job satisfaction. Job demands reduce job satisfaction, whereas intellectual demands, or decision-making latitude, increase job satisfaction. Even when there are high demands, if employees also have high decision-making ability, they will be able to thrive. Having high decision-making latitude also allows for positive coping behaviours to be learned and experienced.

What happens when employees can't manage their workload?

If any system is subject to excess load without respite it will break. This is as true for people as it is for equipment. Increased demands, without opportunities for control, result in physical, psychological and emotional fatigue, and increase stress and strain. This has a negative influence on performance. Emotionally fatigued individuals also have a diminished sense of personal accomplishment and an increased sense of inadequacy. One of the main reasons employees feel negatively about their jobs and their employers is excessive workload.

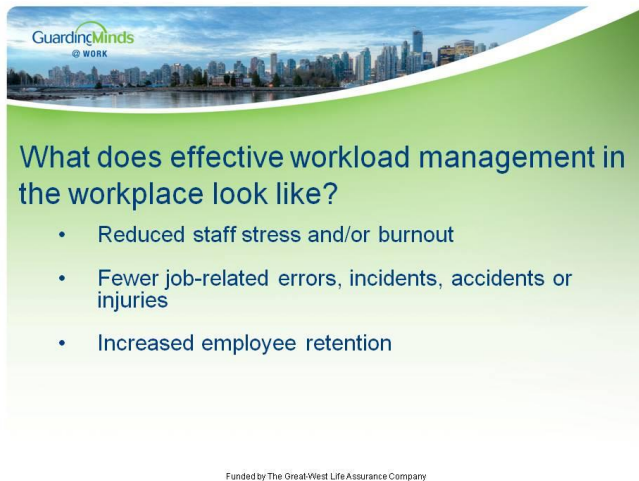
How can Workload Management be improved?

Start by conducting the GM@W Organizational Review and/or the GM@W Survey and reviewing the results. If **Workload Management** is identified as an area of concern or relative strength, refer to the GM@W Action Resources for a practical strategy and evidence-based and effective suggested actions that can improve **Workload Management**. It is also important to discuss the findings with employees to gain a further understanding of the results and to obtain input into possible interventions. Furthermore, it is important to evaluate the undertaken interventions over time to ensure they are effective and to take corrective action where needed. Consider reviewing the resources below. Finally, refer back to the GM@W website on occasion for new ideas about how **Workload Management** can be enhanced.

Further information about Workload Management:

- Barnes, C., & Van Dyne, L. (2009). 'I'm tired': Differential effects of physical and emotional fatigue on workload management strategies. *Human Relations*, 62(1), 59-92. doi: 10.1177/0018726708099518
- Gilbert, M. & Bilsker, D. (2012). *Psychological Health and Safety: An Action Guide for Employers*. Retrieved from http://www.mentalhealthcommission.ca/SiteCollectionDocuments/Workforce/Workforce_Employers_Guide_ENG.pdf
- Health and Safety Executive. (2012). Work related stress – together we can tackle it. In *Guidance*. Retrieved from <http://www.hse.gov.uk/stress/index.htm>
- Karasek, R. (1979). Job demands, job decision latitude, and mental strain: Implications for job redesign. *Administrative Science Quarterly*, 24(2), 285-308. Retrieved from <http://www.jstor.org/stable/2392498>
- Lardner, R., Amati, C., & Briner, R. (2002). *Stress management standards for workload*. Retrieved from <http://www.keilcentre.co.uk/Data/Sites/1/Workload%20-%20Stress%20Management%20StandardsFinal.pdf>
- The Great-West Life Assurance Company. (2012). PF9: Workload Management. In *Centre Resources by GM@W Factor and On the Agenda*. Retrieved from <http://www.workplacestrategiesformentalhealth.com>

www.guardingmindsatwork.ca



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What does effective workload management in the workplace look like?

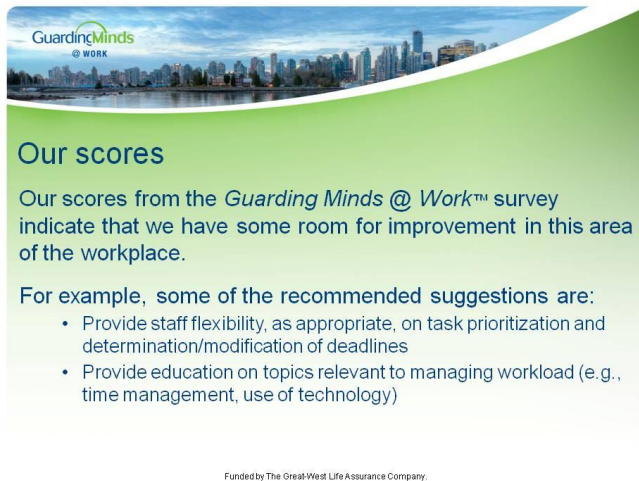
- Reduced staff stress and/or burnout
- Fewer job-related errors, incidents, accidents or injuries
- Increased employee retention

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Slide # 3

This slide details what a workplace with a well-managed workload may look like. Simply read the points on the slide. If you would like to expand on the information, we suggest elaborating on what a workplace with a poorly-managed workload may look like. You can suggest the following and why you don't want this for your group:

- Physical, psychological and emotional fatigue among employees
- Increased sense of inadequacy among employees
- Employees have a diminished sense of personal accomplishment



Our scores

Our scores from the *Guarding Minds @ Work*™ survey indicate that we have some room for improvement in this area of the workplace.

For example, some of the recommended suggestions are:

- Provide staff flexibility, as appropriate, on task prioritization and determination/modification of deadlines
- Provide education on topics relevant to managing workload (e.g., time management, use of technology)

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Slide # 4

If your workplace or a sector in the workplace completed the *Guarding Minds @ Work* (GM@W) Survey, you may wish to review the scores now. Let your employees know that there is always room for improvement, and it is also important to recognize and retain what is already working.

- Review the suggestions on the slide and let them know that putting psychological health and safety on the agenda is an active step towards managing workload.
- If your workplace has not undertaken the GM@W Review and Survey, ask the employees if they feel the suggestions on the slide would be helpful, and why or why not.

GM@W Suggested Responses

Please consult the *Selection of GM@W Suggested Actions* and *Selection of Effective Actions: Applying a Quality Framework* documents to help you select GM@W suggested actions to undertake for Workload Management.

PF9: WORKLOAD MANAGEMENT

OBJECTIVE: A work environment where tasks and responsibilities can be accomplished successfully within the time available.

PF9: GM@W Survey Results (check rating, if applicable)	<input type="checkbox"/> SERIOUS CONCERNS	<input type="checkbox"/> SIGNIFICANT CONCERNS	<input type="checkbox"/> MINIMAL CONCERNS	<input type="checkbox"/> RELATIVE STRENGTHS
PF9: GM@W Organizational Review Results (check rating, if applicable)	<input type="checkbox"/> SERIOUS CONCERNS	<input type="checkbox"/> SIGNIFICANT CONCERNS	<input type="checkbox"/> MINIMAL CONCERNS	<input type="checkbox"/> RELATIVE STRENGTHS

Serious Concerns = 5 to 9 Significant Concerns = 10 to 13 Minimal Concerns* = 14 to 16 Relative Strengths = 17 to 20**

* Although this is a Minimal Concern, it is important to attend to it and review the GM@W Organizational Review Results and the GM@W Survey Results for any additional or individual-identified areas of concern.

** Although this is a Relative Strength, it is important to review the GM@W Organizational Review Results and the GM@W Survey Results for any additional or individual-identified areas of concern.

The list below contains actions that you can take to respond to actual or potential concerns related to **Workload Management**. Many of these actions have been found to be effective in research studies, have been recommended as best practices, or have been found valuable in applied settings. Some have been informed by emerging case law and regulatory requirements. **Workload Management** is an area of particular importance from this perspective (see also: PF1, 4, 5, and 12). The actions are drawn from diverse industries and sectors, and not all may be applicable or feasible in your particular workplace. This list is not exhaustive, nor is it intended to be prescriptive. Rather, these are suggestions for possible courses of action.

If **Workload Management** has been flagged as a **Relative Strength** in your workplace, it is important not to overlook this finding. You can do this by developing policies that protect this relative strength and engaging staff in discussions of how this strength can be enhanced by implementing the suggested actions below.

If **Workload Management** has been flagged as an area of concern in your workplace, consider which of these actions might be appropriate. In making your decision, it can be helpful to keep the following six key quality dimensions in mind: Appropriateness, Acceptability, Accessibility, Effectiveness, Efficiency and Safety (see *Selection of Effective Actions: Applying a Quality Framework* for more information).

The actions below fall into four main categories: (1) norms, values and practices of the work environment; (2) training and development initiatives; (3) communication strategies and approaches; and (4) formal policies and programs. You may have already initiated some of the actions – but consider the others. You may also have other ideas for actions you could implement – there is a space for writing these down at the end of this document. **Remember, not every action that might enhance Workload Management in your workplace is listed here. Implementing the following actions, however, will provide a strong foundation for building a psychologically healthy and safe workplace.**

Work Environment (Norms, Values & Practices)

- Cultivate a work culture that clearly values the quality of work done, not simply the quantity of work (e.g., hours worked)
- Assign workload equitably, with consideration for varying levels of responsibility associated with different positions
- Allow staff flexibility, as appropriate, on task prioritization and determination/modification of deadlines
- Ensure that the necessary equipment and supports are available (e.g., tools, technology, support staff) to help complete work competently and efficiently
- Generate, communicate and implement timely strategies for dealing with peak periods of demand (e.g., temporary staff, job pools, job sharing)
- Acknowledge and appreciate employees' efforts during times of high work demand

Training & Development

- Orient new staff comprehensively, providing accurate and realistic information about job demands and expectations
- Assign tasks based on the particular strengths and abilities of individuals, ensuring equity throughout the process
- Provide education on topics relevant to managing workload (e.g., time management, use of technology)
- Provide education on resiliency, stress management and burnout (e.g., on signs and effects of stress and strategies for self-care)

Communication

- Communicate regularly with staff about how they can optimally manage and adjust their workload
- Inform and prepare staff for anticipated periods of increased work (e.g., seasonal demands, peak shift hours)
- Actively involve employees in the development of strategies to better manage workload (e.g., reduction or elimination of redundant or unnecessary tasks)

Formal Policies & Programs

- Create written job descriptions that include explicit and reasonable productivity expectations
- Provide pay or accrued time off for approved overtime worked
- Ensure that systems are in place to cover staffing shortages (e.g., due to vacation, sick leave, unfilled positions)
- Conduct job analyses/audits to determine workload demands, equity in work distribution and areas for improvement
- Provide non-remunerative perks during times of excessive work demands (e.g., meals, coverage of transportation costs)

Additional resources have been created to help you take action, including: presentation slides and supporting materials (freely available at www.workplacestrategiesformentalhealth.com/ota) and a new resource - *Psychological Health and Safety: An Action Guide for Employers*, developed on behalf of the Mental Health Commission of Canada Workforce Advisory Committee, that is a practical tool designed to help employers develop implementation plans on the basis of GM@W findings (freely available at www.mentalhealthcommission.ca/SiteCollectionDocuments/Workforce/Workforce_Employers_Guide_ENG.pdf).

We encourage you to review these resources for additional suggested actions.

Other Actions:

- _____

- _____

- _____

There won't be a perfect set of actions – often it's a matter of choosing the actions most likely to accomplish positive outcomes while generating the fewest potential problems.

Once you have selected one or more actions to undertake, enter them into the corresponding *GM@W Action Planning Worksheet*, pick your start date, identify who will be involved – your Action Team, and get started!



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Activity

Review actions recommended by research or best practices

Choose the recommended actions that:

- Are most likely to be effective in promoting effective workload management
- Are low cost or no cost in terms of both time and expense
- Will have a measurable benefit to the workplace as a whole

Slide # 5

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- Review the recommended actions in the GM@W Suggested Responses document, or choose those that you wish to share with the group as possibilities.
- Ask the employees to work in groups of three or more to review the suggested responses, and discuss what each of these may mean for your workplace in regards to practicality, profit, cost and challenges.
- Ask that someone keep notes, and let them know that their group is to report back to the larger group in 15 minutes.
- Ask for a group to volunteer to start the report back and begin the discussion to choose which initiative(s) to begin with.
- Check out the Centre website at www.workplacestrategiesformentalhealth.com for free resources related to workload management.



Slide # 6

- Ask the employees to vote on the most important recommendation that they heard from the previous exercise. Ballots, Post-it Notes, stickers or raised hands are all ideas that could be used for voting.
- If there is a discrepancy, see if you can narrow the options down to two and discuss the potential pros and cons of each option and then re-vote, or consider implementing more than one option at once if this would be practical.
- Develop a statement with the group about why the chosen recommendation is important; get to the underlying need that is being met.



The slide thumbnail features a green background with a city skyline at the top. The logo 'Guarding Minds @ WORK' is in the top left, and the word 'Activity' is in red in the top right. The main title is 'Create a plan to implement'. Below it, it says 'Use the handout provided to:' followed by a bulleted list of five steps: 'Describe the action', 'Assign tasks to individuals on the team', 'Create a start date', 'Develop an indicator to determine if the action had the desired effect', and 'Create a date to evaluate'.

Slide # 7

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- Hand out the Action Planning Worksheet to each employee so he or she can follow along.
- Identify each step required to implement the chosen action(s).
- Review the steps and ask for volunteers to take on different actions. If individuals feel uncomfortable taking on an action by themselves, suggest working in pairs or groups.
- Set a follow-up date to review progress on the action items together, as well as an expected completion date.

GM@W Action Planning Worksheet

Name: _____

Position: _____ Date: ____/____/____

PF9: WORKLOAD MANAGEMENT

OBJECTIVE: A work environment where tasks and responsibilities can be accomplished successfully within the time available.

PF9 GM@W Survey Results

PF9 GM@W Survey Score: _____ (5 to 20)

Date administered: ____/____/____



PF9 GM@W Organizational Review Results

PF9 GM@W Organizational Review Score: _____ (5 to 20)

Date administered: ____/____/____



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	Selected Action(s) (What exactly are you planning to do?)	Starting Date (What is a realistic date to begin?)	End Date (Is the action ongoing or will it end? If so, when?)	Action Team (Who is involved? Be specific.)	Indicator(s) (What changes do you expect to result from this Action?)	Evaluation Date (When will you determine if the Action was successful?)
Action Priority 1:						
Action Priority 2: <i>(if applicable)</i>						
Action Priority 3: <i>(if applicable)</i>						



Slide # 8

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For this slide, we suggest encouraging your employees to check out the *Workplace Strategies for Mental Health* website at www.workplacestrategiesformentalhealth.com. The website features a number of employee-specific resources they can access for free:

- Self-assessment tools to check their current state of mental health
- Information about mental health, addiction and mental illness
- Approaches to mental wellness and coping with workplace stressors
- *Working Through It*, which is a video-based series of video clips by, and for, those struggling while at work, off work or returning to work