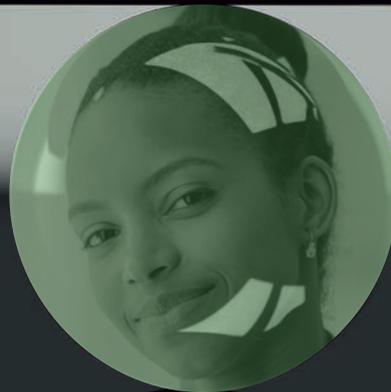




A better

work-life balance



A practical guide to organising and negotiating to  
address workload concerns in further education colleges

# Contents

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How to use this guide	4
Why organise and negotiate to address workload?	4
How to negotiate an agreement with the employer	5
Getting started	6
Establishing an agreement or policy	6
Opening discussions with employers	6
Improved morale and retention	6
Health and safety	7
Using appraisals and development review meetings to raise workplace issues	7
Start your campaign	7
Recruit and organise using workload concerns	7
Gather your evidence	8
Work collectively and identify your allies	9
Find out what your members think	9
Changing the workplace culture	9
Publicise your workload agreement	9
What to include in your agreement or policy	10
Regulation of excessive working hours	10
Regulation of excessive workloads	10
Management training	10
Mechanisms to discuss workload	10
Management training	11
Next steps	11
Monitoring overtime and unpaid hours	11
Keep a diary	11
Monitor hours over a set amount of time	11

Analyse and publicise your findings	11
Note areas for concern	12
UNISON training	12
Further Information	13
Appendix 1	14
Model workload survey	14

## How to use this guide

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In this booklet you will find practical advice on how to share and raise workload concerns with colleagues and managers. The advice explains how you can work with your colleagues and UNISON representatives to seek an agreement with your college on how workload should be managed and what should be included in a 'workload agreement' that covers all employees.

This guide:

- gives an overview of the need to address workload in further education
- explains the stages involved in negotiating a workload agreement to tackle the problem
- shows the stages to follow to organise a successful campaign
- gives pointers towards training that UNISON offers to support members and workplace representatives and where they can go to find further information.

## Why organise and negotiate to address workload?

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Since 2008, government spending cuts have led to over half a million job losses across the public sector. Many members are telling us that they now have a smaller workforce to do the same or more work. In further education members have told us that as a result of restructures there is a further prevalence of job insecurity among staff and an increase in workload. In many colleges jobs are not being replaced when colleagues leave due to shortfalls in funding.

An unrealistic and ever-increasing workload is becoming a daily reality for many employees. A recent survey of UNISON members working in further education found that an increasing and unmanageable workload was among the top three concerns for college staff along with pay and job security.

A wider UNISON survey of education support staff highlighted workload problems and over 55% are struggling to complete their work each week. More than 10% feel that their workload is 'impossible' and that they never manage to do all of the work expected of them. Members have told UNISON that they do not feel valued or get recognition for the increased workloads they are experiencing, particularly in terms of the pay they receive.

Professional support staff are vital to the student experience and provide a huge amount of goodwill to their work, often putting in extra hours. Working extra hours on a regular and/or long-term basis should only be done if compensatory time off is agreed or extra money paid. Working excessive hours can lead to exhaustion and resentment, both of which need to be addressed.

Workload has a serious impact on morale and health too – UNISON has heard that staff have suffered from stress, anxiety or depression due to workload. There is a cost to the individual, their colleagues, and to colleges in terms of sick-pay and cover arrangements. Workload problems can have a major impact on the ways in which colleges provide support for



*Workload significantly increased. Pressure and stress and expected to do additional duties without training. Senior managers don't want to know how it impacts on staff wellbeing and morale*



students and on the wellbeing of their workforce. More work given to fewer people costs colleges more in the long run.

Given the extent of this problem in further education, workload is a priority issue for UNISON. Not addressing workload is not an option for employers – there is a cost to morale and goodwill, health, and staff retention.

## How to negotiate an agreement with the employer

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This section sets out the main issues for UNISON branches when negotiating on workload with an employer. This advice outlines some techniques to monitor overtime and unpaid hours. It also gives ideas on how to engage with an employer so that managers are able to properly support employees who have problems with workload.

UNISON branches and representatives can play a critical role in the workplace by establishing local agreements and joint work with employers that protect employees against excessive workloads. This can support workplace health and safety by regulating excessive working hours. Part of any agreement should be to establish a framework whereby employers support employees and give practical guidance on reducing excessive workloads. It is also important to ensure that managers are assessing the risks to staff regularly and taking appropriate actions when required.

If staff working excessive hours is a problem in your college then you can refer to the “Joint Agreement on Regulating Working Hours in FE Colleges”. For a copy of this national agreement go to [https://www.unison.org.uk/content/uploads/2018/06/fe\\_workhoursagreement\\_nov09.pdf](https://www.unison.org.uk/content/uploads/2018/06/fe_workhoursagreement_nov09.pdf). This was agreed by the Association of Colleges and all of the FE college trade unions in 2009 and encourages colleges to implement a culture of not working excessive hours, allowing staff to have control over their working arrangements, and ensuring that senior managers and line managers take responsibility for reviewing work allocations.

Key principles are the bedrock of any workload policy; staff have the right to reasonable workloads, a fair distribution of work, to socially acceptable working hours, and they are entitled to regular daily, weekly and annual breaks from work. Staff are able to challenge excessive workloads through the agreement.

Nationally, UNISON has raised the issue of workload in colleges with the employers.

In Wales workload has been a crucial part of negotiations between the joint unions and ColegauCymru. In Scotland the joint unions are seeking national agreements on hours of work, unsocial hours working and annual leave entitlements.

In England the joint union pay claim for 2017/18 asked the employers to take action on workload and ensure continuing professional development opportunities for all. The pay recommendation from the Association of Colleges stated:

*“The employers’ side is sympathetic to this aspect of the Joint Trade Unions pay claim and is mindful of the existing principles in the Joint Agreement on Regulating Working Hours in FE Colleges.”*



*Increasingly, I find myself working outside normal working hours simply to get work done. My job is student-facing and at present I’m the only one offering the support they require (study skills support)*



## Getting started

If your college already has UNISON representatives they can consider the ideas in this guidance and make a plan of action about how tackle the problem. College-based representatives can get extra support and advice from the local UNISON branch with the campaign and negotiations.

If your college doesn't have a UNISON representative you can ask your branch to come and help you raise these issues with your employer. Members should consider who should be their union representatives so that they can work together within the college and make sure that this issue remains on the agenda.

Remember, UNISON provides free training for representatives and you should be entitled to paid time off to attend training – your branch can help you arrange this. Your branch may also be able to help you work with other colleges so that you can launch your campaign together and support each other.

## Establishing an agreement or policy

UNISON representatives should discuss establishing a college level workload agreement, or working hours agreement, locally with management and publicise this to members. This may take the form of a written agreement, a policy, or a joint working group on workload. This may require a project in which unions and the employer work together as part of a health and safety committee or staffing committee. Many colleges will already recognise the health and safety implications posed by staff working excessive hours with unmanageable workloads and will want to discuss with unions how to alleviate stress on staff by managing workloads.

## Opening discussions with employers

Reasons to establish a local workload agreement or policy include:

### Improved morale and retention

Benefits to tackling workload problems include improved health and more congenial working conditions for all staff, a reduction in sickness absence rates and improved staff morale and retention of staff. Better morale leads to greater productivity, so everyone wins. UNISON representatives could also work with HR to identify levels of staff turnover and explore the reasons why staff are leaving the organisation. This could be down to work-related stress, staff shortages and workload issues. Recruiting and training new staff is an additional cost to the college that may be reduced if workload is addressed.

### Health and safety

Excessive workload is a health and safety risk. Having a manageable workload is part of safe working practice and every college should have a nominated manager responsible for health and safety. Regulations 3 and 4 of The Management of Health and Safety at Work Regulations 1999 require employers to risk assess any hazards posed to staff and that it is the responsibility of the employer to put measures in place to eliminate any risks to staff and their health. You can raise with the employer their responsibility to ensure safe working practices under The Working Time Regulations 1998.



*My workload is unmanageable – there is no structure or system in place to measure good work/life balance*



Your college may also have a health and safety committee. If your college has a UNISON health and safety representative then they can play an active role discussing workload, assessing the extent of the problem and raising this with management.

A trained health and safety representative can ask the employer to carry out a stress risk assessment.

Full details on how to use health and safety regulations if excessive workload is causing stress, can be found in *Stress at Work: A Guide for UNISON Safety Reps* (search 'stress at work' on UNISON's website). This advice includes information about carrying out risk assessments and the Health and Safety Executive's (HSE) stress management standards.

If you don't have a UNISON health and safety representative at your college contact your UNISON branch to ask for help.

## Using appraisals and development review meetings to raise workplace issues

Workplace appraisals and development reviews give managers an opportunity to discuss with staff their work plans for the year and any workload issues that arise from this or that have already arisen. Managers should not use this as an opportunity to place staff on capability procedures just because staff have been brave enough to raise issues around excessive work. A locally negotiated workload agreement will help protect against this and it may go some way to changing the organisational culture of raising concerns.

Encourage UNISON members to speak to their manager about the problem before it gets too serious. Ask the member to think about their job and list their main duties and to prioritise them before the meeting. They can then discuss the list with their manager and seek agreement about what they must do and what might not get done if there is too much work. Make sure that members have support by discussing the problem with them and accompanying them to the meeting if they are allowed to take a representative with them. Follow up the meeting in writing with an email thanking the manager for the meeting and confirming the actions that were agreed.

## Start your campaign

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### Recruit and organise using workload concerns

- Excessive workloads are an important campaigning issue for the branch to organise around – and in the process – recruit new members. A campaign should encourage members and non-members to speak out about the issue and not feel isolated.
- The campaign should aim to raise awareness of workload issues within the college and publicise the branch's efforts to work with management to establish a workload agreement.
- The campaign should promote the message that having a healthy work/life balance is good for staff and good for the employer.
- Branches should hold workplace meetings where they can speak



*Restructures have led to evolving roles so changing workload and expectations – job description does not match*





*Annual leave is generous, but because of low staffing levels I feel I cannot take all of my allocation – otherwise service would be affected*



directly with members about their workload issues and discuss possible solutions to put to management.

- Branches can raise awareness by emailing members and promoting the campaign. As part of the campaign the branch should circulate a confidential on-line workload survey or paper questionnaire. The findings of this survey can then be reported back to members. The results obtained from the survey can be used to put forward a case to management the need for a workload agreement.
- Establishing a workload agreement would be a good win to promote UNISON within the college. It may also help encourage and promote positive collaborative working with other trade union colleagues in the college.

## Gather your evidence

If excessive workload is a problem in your college it is important to gather your evidence to present to local managers. Your UNISON representative can help you in this process. The advice on the following pages gives lots of ideas about generating evidence to find out the scale of the workload problem. You can also refer to:

- Your contract of employment. This should contain your hours of work. If you don't have a copy, then your HR department should be able to supply this.
- Your job description. This should make clear what work staff can be asked to do (as well as what you won't be asked to do). Your local manager or HR department should be able to supply this.
- Your role profile evaluated by your employer. Role profiles are used to evaluate jobs using a job evaluation scheme. They give an indication of the range of tasks and responsibilities your job may have. The profile will be used to determine the correct grade for your job and the pay you will receive.
- Unpaid overtime. Where there is evidence that professional support staff with established contractual arrangements are being expected to undertake 'unpaid overtime' this needs to be raised with local management. This is unacceptable and an issue that should be addressed. A proper discussion must take place between the member(s) of staff with the local manager to try and resolve the issue. This might involve:
  - paying overtime
  - extending, by agreement, the hours required under the contract with the appropriate increase in salary
  - allocating the additional work to other members of staff.

## Work collectively and identify your allies

If possible, UNISON members should work collectively with other unions to promote the benefits of having a workload agreement in place and demonstrate how the policy can be used to raise standards. Talk to the unions in your college and see if you can run a joint campaign. It is important to ensure that you cover all employees in the college if possible.

Get support and advice from your local UNISON branch. If you don't have a contact for them call UNISON Direct on 0800 0 857 857. You may want to run your campaign jointly with other colleges.

## Find out what your members think

You will need to find out how serious the problem is in your own college. If you and your colleagues have identified workload as an issue in your organisation you should run a workload/stress survey and present the findings to management as a means of evidencing excessive workloads within the organisation. Make clear that any responses from the survey will be confidential and individuals will not be identifiable. A model survey on workload is provided in this guide (Appendix 1), which you can adapt with any other questions that you think would help you to build a good case.

Ask members and non-members for their views. You can use this survey to ask non-members to join the union, which will make your campaign stronger. Your branch should be able to help you if you need to send the survey out by email or post, but remember it's also good to talk to your colleagues about what you're doing so they can get more involved.

## Changing the workplace culture

Union representatives should emphasise that a workload policy or clear commitment from the employer can help staff to speak out about excessive workloads and unsafe working conditions. It's better for employees to feel comfortable raising their concerns instead of remaining silent and isolated in the college trying to complete a job that is impossible. Encourage your college to tackle the problem before it escalates to crisis proportions.

Present your data to the employer and work with them to agree the best way to take this forward and address the problem for everyone.

## Publicise your workload agreement

If the union and employer are able to negotiate a workload agreement or policy you need to let your members know about it. You can suggest to the employer that a joint message be sent out to all staff about the new policy and it could be introduced on a staff training day. UNISON representatives can arrange a meeting at the college to let members know. Make sure that your UNISON branch has a copy of the agreement and please send a copy to [education@unison.co.uk](mailto:education@unison.co.uk). If you are able to negotiate an agreement it can help other colleges to negotiate one in their college too.

### **If all else fails...**

If your employer is unwilling to tackle workload, there may be other ways to incorporate the key principles of a workload agreement into other organisational policies including work/life balance policies or working time policies.

Below is an example from a college where joint unions negotiated a policy that covered hours of work and overtime:

*"The working hours policy at the college sets out how working time and the wellbeing of staff is 'paramount' and the expectation that staff should not consistently work in excess of their hours. Where it is identified an*

“  
*Due to being short staffed we have to work through lunch-breaks and stay late without overtime pay*  
”

*individual staff member is consistently working too many hours they should meet with their line-manager and examine why this is happening”.*

The agreement sets out HR’s duty to collect data on staffing levels and review working patterns, methods, efficiency and training for staff.

The final part of the agreement gives an explanation (by grade) of what hours staff should be expected to work and what remuneration staff will earn for working agreed overtime.

### **Share your success**

Please share your campaigns and your successes on reducing workload with us by contacting [education@unison.co.uk](mailto:education@unison.co.uk). If you need extra help and support contact your branch and consider becoming more active. UNISON relies on local workplace volunteers so the more who volunteer the more we can achieve. UNISON provides the training and resources and advice to help you at every stage.

## What to include in your agreement or policy

The agreement should apply to all staff and include the following key principles:

### Regulation of excessive working hours

There is already legislation covering excessive working hours. Therefore, your agreement should recognise that the Working Time Directive sets out minimum standards of employment in relation to monitoring working time and promotes staff having a healthy work/life balance. There should be references to contracted working hours ensuring that employees are not regularly expected to work beyond those hours and detailing arrangements for compensation and/or time off in lieu if extra hours are worked.

### Regulation of excessive workloads

The agreement should make sure that staff have the right to reasonable workloads and a fair distribution of work. This should detail the responsibility that managers have to ensure that workloads are realistic and achievable. The agreement should take account of overtime, shift workers or work outside normal working hours.

### Management training

The agreement should set out how managers should manage workloads in a fair and transparent manner. Managers should be offered training on supporting employees with their workloads and use the appraisal system as a tool to discuss and identify workload issues. Managers should be given advice and training on how to appropriately manage staff absence.

### Mechanisms to discuss workload

The policy needs to have a mechanism for employees to discuss unfair or unreasonable workloads. Where workloads are disputed, staff should be invited to attend a meeting with their manager and are entitled to be accompanied by their trade union representative or full-time trade union official.

“

*Having a heavy workload means that we are not able to give the students and tutors the support and time we would like to*

”

## Management training

Though any locally negotiated workload agreement may set out agreed key principles, it is important that managers are trained to understand the agreement in order for them to support staff with workload issues.

If staff are raising problem with workloads, working excessive hours and there are incidents of staff absences due to work-related stress, managers need to take action. Managers need to be given the training and authority to effectively address workload problems experienced by their staff.

As well as training managers to understand the workload agreement, managers should be trained in delivering effective one-to-one support and appraisal meetings where workload issues can be identified.

## Next steps

If an employee disputes their workload and, following the meeting, the employer takes no action to resolve the situation, then the employee should use the college's grievance procedure to pursue an outcome. Make sure the member gets advice from the union before lodging a grievance. If the situation affects a group of staff a collective grievance could be lodged but advice from the union must be sought first.

## Monitoring overtime and unpaid hours

Monitoring overtime and unpaid hours is best undertaken jointly with the employer if possible. Below are two examples:

### Keep a diary

If a workload issue has been identified, ask colleagues to keep a record of the hours they have worked on a time-sheet. Staff could keep a log of their hours in a diary or on a printed or electronic spreadsheet that will automatically work out working time. If keeping a paper time sheet is time consuming many members will have access to electronic devices that could be used to log their hours like a mobile phone or tablet. Some staff may have their own online calendars where they can log their hours as a record. If employers are unhappy about this monitoring, restrict this exercise to UNISON members as part of a local campaign on workloads.

### Monitor hours over a set amount of time

Working hours should be monitored across a four-week period in order to get a clear picture of the hours staff are working in different areas of the college.

### Analyse and publicise your findings

Once the data has been gathered, work out how many extra hours a month staff are working and how much the individual members are losing in unpaid hours. Staff should be aware of how much money they are losing out on and how many extra unpaid hours the college is gaining a month through the goodwill of the workforce.

Publicise the findings to your members. You could send them an email, write a short leaflet and call them together for a quick lunchtime meeting to discuss the results.



*Having too much to do means that sometimes colleagues do not follow proper health and safety practices*



## Note areas for concern

Staff working excessive hours is an indication of workload issues within the college. This data will tell the union and the employer the scale of the problem and if there are any particular 'hot spots' within the organisation that are overstretched. Branches should use these monitoring sheets as a campaign tool to negotiate a workload agreement with the employer and flag any concerns to address the workload problem and raise health and safety concerns.

## Tips from UNISON activists for members

The following ideas were suggested by UNISON activists who have tried these in their workplaces:

- When you email your manager requesting a workload meeting you should copy in HR and your UNISON representative or branch.
- Prioritise your workload and discuss it with your manager. Agree what is most important and least important and what might not get done if you have too much to do.
- Ask your manager what they think you shouldn't do.
- Make sure you let your college know if you think an accident may happen due to excessive workload. Colleges need to be safe places for all – students, lecturers, support staff, parents and visitors.
- Always follow up your meeting by putting it in writing.
- Celebrate the hard work that support staff do in colleges by organising an event. Be creative in your planning.
- One UNISON member working as a technician said that she sets an alarm clock to ring at 4pm (when she is due to go home). She said "I don't down tools and walk out, but I don't start any new work. My colleagues know now not to give me more work after that time."

If you have any more tips or advice that has worked in your college email us at [education@unison.co.uk](mailto:education@unison.co.uk)

## UNISON training

Nothing will change if you don't ask for it. Once you have gathered your evidence then a dialogue can be started by making management aware of the stresses and strains that staff are under. UNISON is aware that these can be difficult conversations and we help in the following ways:

- UNISON can provide learning opportunities to boost confidence, improve your communication skills and help you get the most from your appraisal or review meetings. You can use these training events to organise and recruit new members. Liaise with your branch about who will contact your UNISON regional organiser or education officer to get this put on.
- You can become a UNISON health and safety representative. You'll receive time off for your training and it will cover all the information you



need to make sure that your college complies with health and safety legislation. You can share the role with a colleague so that there's always a UNISON health and safety representative at work.

- You can call UNISON Direct on 0800 0 857 857 to find out the contact details of your local branch.

## Further Information

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### **National agreement with unions and the Association of Colleges**

See the Joint Agreement on Regulating Working Hours in FE colleges on UNISON's colleges webpages [https://www.unison.org.uk/content/uploads/2018/06/fe\\_workhoursagreement\\_nov09.pdf](https://www.unison.org.uk/content/uploads/2018/06/fe_workhoursagreement_nov09.pdf) or email [education@unison.co.uk](mailto:education@unison.co.uk) for a copy.

### **Stress in the workplace**

See *Stress at Work: A Guide for UNISON Safety Reps* (Search 'stress at work' at: [www.unison.org.uk](http://www.unison.org.uk))

Working time regulations negotiators guidance: <https://www.unison.org.uk/content/uploads/2013/06/Briefings-and-CircularsWorking-Time-Regulations-Negotiators-Guidance2.pdf>

Search 'hours and leave' at: [www.unison.org.uk](http://www.unison.org.uk). This includes information about Working Time Regulations.

### **Health and safety**

*Health and Safety: A guide for UNISON safety reps* (Search 'Health and safety a guide' at [www.unison.org.uk](http://www.unison.org.uk))

## Model workload survey

Please tick box

### How manageable is your workload?

- I have some spare capacity to pick up extra work
- About right: I can do all or most of my work each week
- I struggle each week to do all of my work
- Impossible – I never manage to do everything asked of me

### In the past year; have you ever come to work early or stayed late outside your normal working hours, in order to keep up with your workload?

- Yes, rarely
- Yes, monthly
- Yes, weekly
- No

### In a typical week, how many hours in addition to your normal contracted hours do you work as:

(Please write in the number of hours on the dotted line)

- Paid overtime (either paid or taken later as ‘time off in lieu’ – TOIL)

.....

- Unpaid overtime (no pay and no TOIL)

.....

- I don't work overtime.

.....

### Do you feel able to report your workload concerns to your manager?

- Yes
- No

### Do you believe that your workload is damaging your health (e.g. causing stress or depression)?

- Yes
- No

### Have you considered leaving your job due to workload?

- Yes
- No

**Are you consulted about proposed changes that affect how you work?**

Yes     No

**Does your workload negatively affect your personal life, family and/or other responsibilities?**

Yes     No (If yes, please describe how).

**Would you like to join our campaign to tackle workload?**

Please give us the contact detail

Name:

.....

Preferred telephone number:

.....

Preferred email:

.....



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