**Model workload agreement**



Please note that the text in square brackets ***[…]*** indicates where you need to complete information specific to your workplace, or else are notes for you to consider in relation to your negotiations.

**WORKLOAD AGREEMENT BETWEEN *[NAME OF EMPLOYER]* AND *[UNISON BRANCH]***

1. **General principles**
   1. Both ***[name of employer]*** and ***[UNISON branch]*** recognise that excessive workloads have a damaging effect on the mental and physical health and wellbeing of staff, as well as morale and productivity. As a result it can have a negative impact on services through an increase in turnover and sickness absence.
   2. ***[Name of employer]*** recognises that staff have the right to reasonable workloads and a fair distribution of work.
   3. To help staff achieve a healthy and sustainable work-life balance, ***[name of employer]*** recognises that every worker is entitled to switch off or ‘disconnect’ outside of their normal working hours and enjoy their free time away from work without being disturbed unless there is an emergency or agreement to do so.
   4. This workload agreement sets out the steps that will be taken to monitor workload and address patterns of excessive workload.
   5. Both parties recognise that workloads fluctuate and there are occasions when workload rises above the norm. However, this agreement is intended to deal with persistent excessive workload.
2. **Trade Union involvement**

2.1 Consultation will take place with the recognised trade union on the implementation, development, monitoring and review of this policy and procedure.

2.2 Union reps will be given training equal to that of managers and supervisors and sufficient time to carry out their duties.

1. **Responsibilities of managers**
   1. Line managers should ensure that all workers are aware of this procedure and understand their own and ***[name of employer]***’s responsibilities.
   2. Line managers should encourage staff to raise workload concerns, investigate those concerns and take appropriate action (see section 5 below).
   3. Line managers should encourage staff to take their full annual leave and plan their workload to maximise the opportunity to take leave.
   4. Line managers are responsible for ensuring that workloads are realistic and achievable and fully take account of issues of overtime, shift working or when working outside normal working hours.
   5. The Head of Human Resources ***[amend as appropriate for your workplace]*** is responsible for ensuring that managers are supported in the implementation of the policy and that it is reviewed and monitored regularly.
2. **Responsibilities of workers**
   1. All staff are encouraged to raise workload concerns with their line manager (see section 5 below).
   2. ***[Name of employer]*** does not expect staff, in normal circumstances, to work more than their contractual working hours or to limit their breaks. All staff are encouraged to take their full rest breaks and annual leave and plan their workload to maximise the opportunity to take breaks and leave.
3. **Raising workload concerns**

5.1 Workers who feel that they have been unfairly or unreasonably treated regarding their working hours (for example being required to work excessive hours, not being permitted to take sufficient rest breaks or being expected to take on additional tasks and responsibilities not included in their job description), should raise this informally with their line manager.

5.2 If their concern relates to their manager, the worker can raise this with a more senior manager.

5.3 Workers have a right to appeal any decision made about their workload concerns.

5.4 This appeal should be made in writing within ***[insert time period e.g. 10 working days].***

5.5 The appeal will be heard by another manager (independent from the case).

5.6 The worker has the right to be accompanied by their trade union representative or full time official to the appeal meeting.

5.7 In the event of failure to agree or dissatisfaction with the outcome of the meeting, the usual grievance procedures should be followed ***[provide a link].***

1. **Mechanism for assessing workload** 
   1. ***[Name of employer]*** recognises that workplace stress is a health and safety issue and acknowledges the importance of identifying and reducing workplace stressors.
   2. ***[Name of employer]*** will consult with trade union safety representatives on all proposed action relating to the prevention of workplace stress and workload concerns, and they will be meaningfully involved in any risk assessment process.
   3. ***[Name of employer]*** will use the [Health and Safety Executive Indicator Tool](https://www.hse.gov.uk/stress/assets/docs/indicatortool.pdf) to identify parts of the organisation where workload pressures are excessive and conduct risk assessments to eliminate stress or control the risks from stress.
   4. Working within the framework of risk assessments required by the Management of Health and Safety at Work Regulations, signs of excessive workload will be jointly assessed with trade union representatives through regular collection and sharing of relevant data.
   5. ***[Name of employer]***’s data will be made available on

* turnover rates
* vacancy rates
* sickness absence rates
* accident rates
* paid hours beyond contracted hours.
  1. These indicators will be broken down by department and occupation to provide the most appropriate basis for any decision made on action.
  2. Turnover data shall show where staff have quoted workload as a reason for leaving and reasons for sickness absence shall also be assessed for signs of workload impact.
  3. This data will be supplemented by a survey of staff on at least an annual basis to identify the following dimensions of workload:
* perceptions of workload and how it has changed
* damage to their health and morale
* scale of unpaid hours worked
* reasons for working unpaid hours
* frequency of staff shortages
* frequency of working beyond grade
* level of support from management.
  1. A thorough workload review will be conducted on at least an annual basis but there will be a presumption in favour of an additional review following a major organisational change, such as a reorganisation or introduction of new technology.
  2. A risk assessment will be conducted of any proposals for new technology using the [HSE Stress Management Standards](https://www.hse.gov.uk/stress/standards/downloads.htm), with regular reviews of the risks and consultation with trade union safety representatives. Particular attention will be paid to ensuring that any automated tracking of work and setting of work rates ***[if relevant to your workplace]*** will be balanced against the health and well-being of the workforce.

1. **Actions to address excessive workload** 
   1. The appropriate actions to address excessive workload will be linked to the conclusions drawn from monitoring data, as will the set of roles / departments where any action should apply. However, the options for action will include the following:

* Continually monitoring working hours arrangements to always ensure compliance with Working Time Regulations in terms of limits on working time, gaps between start and finish times, rest breaks and annual leave.
* Management training to emphasise managers’ role in controlling unpaid hours and preventing operation of a long-hours culture on a consistent basis.
* Management training to identify where workloads are exerting excessive pressures, to take action to reduce or reallocate workloads in a fair and transparent manner, as well as to work with staff in prioritising demands as part of workload management.
* Management training on supporting employees with their workloads and using the appraisal system as a tool to discuss and identify workload issues, as well as how to appropriately manage staff absence.
* Communicating to staff that they have a right to ‘switch off’ or to ‘disconnect’, i.e. to disengage from work and refrain from in-work related electronic communications, such as emails, telephone calls or messages, outside of normal working hours.
* The use of new technology will not be allowed to infringe workers’ ‘right to disconnect’ from work demands outside contracted working hours or when officially on-call. Other than where expressly agreed with the staff member, line managers will not contact staff outside of their agreed working hours for work-related matters. If staff do receive any form of work-related communication outside of working hours, there is no expectation that they read it or respond until within their working hours
* Review of any productivity targets set for the workforce.
* Review of staffing levels against the demands placed on staff.
* Review of tasks required of staff against their job descriptions.

1. **Review and monitoring**

8.1 ***[Name of employer]*** will ensure that all new workers, supervisors and managers will receive induction on the policy.

8.2 Adequate resources will be made available to fulfil the aims of this policy, including for training and development needs. The policy will be widely promoted, and copies will be freely available and displayed in ***[name of employer]***’soffices and through the staff intranet ***[amend as appropriate to your workplace].***

8.3 This policy and its procedure will be reviewed jointly by unions and management, on a regular basis.

1. **Signatories**

This agreement comes into force on:

Date:………………………………..

This agreement will be reviewed on:

Date:………………………………..

SIGNED ……………………………. for ***[Employer’s name]***

DATE ………………………………..

SIGNED …………………………….. for ***[UNISON Branch]***

DATE ………………………………..