

***CUPE·SCFP***

**WORKLOAD AND OVERWORK  
IN ONTARIO SOCIAL SERVICES  
A CUPE BACKGROUNDER**

CUPE RESEARCH

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### **What is Overwork?**

Overwork may best be defined as too many duties and responsibilities for one worker, with too few hours in the day to complete all required tasks. It can lead to feeling overwhelmed, like you've lost control of your life. In a given workplace, it can take many different forms, including but not limited to: working long hours, unreasonable work demands, pressure to work overtime (paid or unpaid), fewer rest breaks, fewer days off, fewer holidays, fast and pressured work pace, performance monitoring, unrealistic management expectations, additional and potentially inappropriate tasks, and no replacements for staff on leaves of absence. One of the results of overwork is that it leaves workers feeling that there's not enough time to do a good job. The increased pace of work also results in fewer jobs as employers are able to provide the same level of services with fewer workers.

More and more Canadians are struggling to keep pace with their work demands. The Canadian Mental Health Association reports that one in four Canadians work 50 or more hours per week, compared to one in ten a decade ago. The fallout from overwork from lost productivity, health claims and absenteeism costs Canadian employers an estimated \$12 billion each and every year. And disability claims arising from overwork can reach as high as 12% of payroll costs.

### **What are the causes of Overwork?**

The severe and persistent underfunding of social services in Ontario is a primary cause of overwork. Underfunding has resulted in restructuring, mergers and amalgamations, program closures, staff layoffs, an increased pace of work, and the marketization of social services through the increased use of direct funding, all of which contribute to overwork and burnout.

Fewer workers are employed to provide the same level of service at a time when the demand for social services is growing. Specific causes of overwork include the following:

- Increased paperwork expectations
- Conflicting employer demands
- Insufficient training, guidance and support
- Too many additional responsibilities
- Worker isolation and lack of contact with co-workers
- No backfilling of workers on leaves of absence
- No backfilling of workers on vacation days and holidays
- Low client to worker ratios
- Lack of full-time workers

Overwork has a direct negative impact on the quality of services provided. Workers often feel responsible or guilty for being unable to provide better quality supports especially in a climate of reduced funding where programs closures and staffing cuts are common.

### **Overwork – A Long-Standing Concern**

Concerns about workload and overwork have been around for a long time in the social services sector. In fact, CUPE members' struggles with workload were captured in surveys dating back to 1999. Sadly, a review of one survey shows not a lot has changed in the past several years:

*For some time, Ontario social service workers have been reporting workload increases coupled with high rates of stress and deteriorating health and safety conditions. CUPE members are facing ongoing attacks on their health, safety and well being as governments move ahead to implement corporate models of downsizing and restructuring under the guise of delivering more efficient public services.*

*In almost all cases, the consequences of re-organization, restructuring, downsizing and contracting out are increasing workloads and a corresponding rise in injuries and stress. In fact, employers are so concerned about stress-related workers compensation claims, that they are consistently lobbying governments across Canada to exclude occupational stress from being compensated.<sup>1</sup>*

Several years after CUPE's 1999 Workload Questionnaire, social services in Ontario are experiencing a new round of restructuring, including:

- Mergers in the child welfare sector;
- Offloading of child welfare services to the community agency sector (e.g., adoption, foster care and family preservation programs);
- Potential mergers in the developmental services sector;
- Potential downloading of ODSP from the province to the municipalities;
- Expansion of direct funding in developmental services;
- Fragmentation of child care for infant and toddler care due to the implementation of full-day kindergarten and the absence of a comprehensive provincial policy for Early Childhood Education and Care (ECEC);
- Changed working conditions in the child care sector including split shifts for workers providing care for kindergarten-aged children in before and after school programs;
- Changes in the funding structure in the child care sector resulting in the "freezing" of subsidies for families.

### **Overwork - A Serious Occupational Health and Safety Issue**

Workload is a serious health and safety concern for workers. Overwork has the potential to negatively impact workers' physical and mental health, which can translate into increased employer costs, lost productivity, and an erosion in the quality of services provided. The impacts of overwork include rather mild symptoms such as headaches to the more serious health effects such as burn-out and depression. Other negative health impacts of overwork include:

- Gradual wearing down of the body
- Stress
- Difficulty concentrating
- Musculoskeletal injuries
- Fatigue and fatigue-related accidents
- Exhaustion

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<sup>1</sup> 1999 CUPE Work Environment Survey  
– **Ontario Social Services: Overloaded and Under Fire.**

- Anxiety
- Gastrointestinal disorders
- Heart attack and stroke
- Increased likelihood of type II diabetes
- Sleep disorders
- Death

The ill effects of stress on workers' health and employers' bottom line cannot be underestimated. Workers who are stressed are more than three times more likely to suffer a major depression compared to those who report lower stress levels. Stressed workers are also more likely to miss more time from work compared to those who report very little stress.

### **Effects of Overwork**

CUPE members work hard to provide a quality public service each and every day, sometimes under difficult circumstances. Overwork can lead to stress, lower job satisfaction and feelings of being overwhelmed, among a host of other negative health effects, all of which impact on workers' ability to provide a quality public service.

Workers often feel they are struggling alone to 'keep up.' Overwork impacts workers' ability to be active in their union and hinders the achievement of a healthy worklife balance. Workers are often frustrated because they're unable to perform their job as well as they would like to. There are also fears that the increased pace of work and lack of time could put the health and safety of supported individuals in jeopardy.

Service quality suffers when staff are emotionally burned out and pulled in too many directions. Overwork can force qualified staff from their chosen field in search of a healthier work-life balance, especially staff with young children. The ability to attract and retain qualified staff is compromised when the volume of work becomes too unmanageable. In fact, younger workers are more likely to take work-life balance into consideration when making career decisions. Ultimately, the client population pays the price of an overworked staff who, through no fault of their own, struggle with providing a quality service and level of care.

Ultimately, workload and overwork is a management responsibility. And the best way to ensure that management takes workers' concerns about workload and overwork seriously is through the collective agreement. The collective agreement should provide a process for workload reviews and assessments; it should also ensure that strategies are in place to reduce and prevent overwork. Workload language should also provide a remedy for redressing workload concerns including access to the grievance procedure.

### **Collective Agreement Language**

Workload has been a coordinated bargaining item in Ontario's child welfare sector for the past several years. Successive rounds of coordinated bargaining in the sector have resulted in significant improvements in workload language. In fact, the most comprehensive workload language in the broader social services sector is found within child welfare. Example 1 represents but one instance of workload language bargained in the child welfare sector.

**Example 1: Child Welfare language****CUPE 2190 and the Catholic Children's Aid Society of Toronto (March 31 2014)****WORKLOAD MANAGEMENT**

The Society and the Union are committed to maintaining a workplace that demonstrates a sincere and continuing interest in the individual and collective well being of all staff and recognizes the inherent worth and dignity of every employee. The Society recognizes that the issue of workload is of serious concern to bargaining unit employees. Further, the Society recognizes its responsibility to provide services through employees in accordance with the Child and Family Services Act and to conform to current Ministry standards. It is also the responsibility of the Society to establish and maintain an effective infrastructure to facilitate the employee's achievement of all standards.

The Society and the Union acknowledge that workload can fluctuate and should be reviewed on an ongoing basis with the goal of equitable and reasonable distribution of workload. The Society acknowledges the important role that the Union plays on behalf of its membership in participating in that ongoing review.

The Society undertakes to utilize a variety of methods in an ongoing effort to effectively manage workload demands. These methods may include, but will not be limited to the following:

1. Assign cases based on equitable distribution of workload, the needs of the branch, the individual skill level and experience, current workload and anticipated workload fluctuations. This may involve the Branch Management Team's knowledge of the following factors:
  - number of cases before the court
  - number of designated high risk cases
  - number of supervised access visits
  - amount of required driving time
  - linguistic skills
  - team coverage
  - leaves of absence, including vacation and prolonged illnesses
  - complexity of cases
  - committee work/field instruction expectations
  - introduction of new technology and systems
  - coaching and mentoring new staff
  - worker's attendance at training
  - part-time education leave
  - work pursuant to the Collective Agreement
  - participation on the Peer Support Team
  - additional administrative duties
  - high profile cases
2. Ensure regular ongoing supervision.

3. Afford employees vacating positions reasonable opportunity to complete any documentation requirements prior to their last day of work.
4. Ensure workload reviews with each service team every other month, analyzing the distribution and volume of workload.
5. The Society will ensure that employees know what is expected of them by: providing ongoing performance feedback through regular supervision; identifying developmental objectives through the annual performance evaluation process.
6. Subject to Article 15.03 b) vacancies will be filled as quickly as possible.
7. Supervisors shall be responsible for ensuring that there is coverage for (including, but not limited to): access visits, recordings, client visits, plan of care meetings, court appearances, required high risk visits, back up days, etc., during worker absences.

In order to meet service needs and legislative requirements, employees shall make every reasonable effort to keep their case related documentation up to date at all times, within the time frames specified within the CFSA, regulations and Ministry standards.

The Society and the Union recognize their shared commitment for the delivery of quality service to children, youth and families. Further, it is the mutual responsibility of the employee and the Supervisor to ensure compliance with Ministry standards with respect to case documentation. Without limiting the generality of the foregoing, the Supervisor shall provide an opportunity for the worker to complete case documentation in those cases where the demands and the requirements of other aspects of the employee's job would impede the employee's ability to complete the case documentation in a timely manner as prescribed. Said opportunity shall not create prolonged or unreasonable workload increases for co-workers.

The Society further agrees to provide time management flexibility so that individual teams (which includes the Supervisors) can determine how to most effectively manage coverage for one another when team members upon request, choose to utilize their approved "protected case documentation day(s)" per month. Such documentation day(s) shall be prescheduled on a monthly basis in a team meeting subject to supervisory approval and service needs.

The Society and the Union agree to review workload issues by each of the following means:

1. Discussions of workload issues will be a standing agenda item at each meeting of the Union/Management Executive as per Article 7.01 and/or Union/HRS Meetings.
2. Where either party identifies an issue that impacts on workload requiring a broader discussion and review, either of the parties can request that an ad hoc Joint Workload Committee shall be struck as follows:

Joint Workload Committee:

a) The purpose of the Joint Workload Committee is to make recommendations to the Senior Leadership Team on ways and means to address said workload issue(s) related to bargaining unit employees and the impact of factors on workload. The Senior Leadership Team will provide a formal response within forty-five (45) working days to the Workload Committee's recommendations. Should a recommendation made to the Senior Leadership Team not be implemented, the reasons for that decision will be provided to the Joint Workload Committee, and the Workload Committee will revisit the issues that led to the recommendation.

b) The Joint Workload Committee will be comprised of three (3) elected representatives from CUPE Local 2190 and up to three (3) representatives from the Society's Management. The Committee shall be chaired by a Management or Union representative on an alternating basis.

c) Time spent attending to the business of the Committee shall be considered time worked. Such business and associated time worked shall be recommended by the Committee and authorized by Human Resource Services.

The Society shall forward to the Union on a monthly basis case assignment statistics detailing each case carrying worker (based upon the Full-Time Equivalent (FTE) status of the position); probation status and the number of cases assigned by type (i.e. investigation/ongoing/children-in-care).

### Workload Assessment Process

It is the goal of the Society to keep the caseload range to manageable levels defined below and effective on the following dates:

| Function                         | March 31, 2010             | 3 months after ratification       |
|----------------------------------|----------------------------|-----------------------------------|
| Intake                           | 7-13                       | 8-10 new investigations per month |
| Ongoing                          | 12-17                      | 12-17                             |
| Children-in-Care-Family Services | 14-19                      | 14-19                             |
| Children-in-Care-Child & Youth   | 15-20                      | 15-20                             |
| Children-in-Care-Adoption        | 15-20                      | 15-20                             |
| Coaches                          | 7 cases when they have 3-4 | 7 cases when they have 3-4        |

Where an individual worker's caseload (total number of cases including cases that are slated for closing or transfer) approaches any of the following levels defined below and effective on the following dates:

| Function                         | March 31, 2010 | 3 months after ratification     |
|----------------------------------|----------------|---------------------------------|
| Intake                           | 13             | 12 new investigations per month |
| Ongoing                          | 17             | 17                              |
| Children-in-Care-Family Services | 17             | 17                              |
| Children-in-Care-Child & Youth   | 18             | 18                              |
| Children-in-Care-Adoption        | 18             | 18                              |

The following Workload Assessment Process will be initiated.

Note: Where a worker has a mixed caseload covering more than one area of service, the caseload number for that worker shall be adjusted, based on an average percentage weighting

of the caseload numbers in those service areas that the worker is involved in. Caseload numbers for part-time workers will be pro-rated accordingly.

Workload Assessment Process will include:

- A consideration of exceptional workload incurred through temporary coverage of another worker's caseload;
  - Identifying and initiating the necessary steps to minimize the likelihood that the individual worker's caseload number will exceed the caseload levels specified above;
1. The Supervisor shall conduct a Workload Assessment of the individual worker's total caseload to determine whether the individual's caseload is likely to exceed the caseload levels specified above or is advised by an individual worker that s/he believes that their workload level has increased to an unmanageable level, the individual worker may request that the Supervisor conduct an assessment of his/her workload. If the Supervisor concludes that the individual worker's caseload is likely to exceed the caseload levels specified above, and is unable to effect the necessary measures, the Supervisor shall involve the Branch Manager or Service Manager to explore alternatives towards resolution. A decision shall be made by either the Supervisor or the Branch or Service Manager level within fifteen (15) working days from the date that the request for assessment process was initiated.
  2. If the individual worker is not satisfied with the decision at the Supervisor or Branch or Service Manager level, the request for assessment may be referred to a Committee comprised of the Director of Service and the Director of Human Resource Services within ten (10) working days from receipt of the decision at the Branch or Service Manager level. The Committee shall convene a meeting of all persons necessary to address the individual worker's request for a workload assessment within five (5) working days of the filing of the issue. The individual worker may be represented by the Union and the individual worker shall be present. The Society and/or the individual worker may have one (1) additional outside representative provided notice of such representative's attendance is given in advance to the other party. The Committee will consult with the CUPE Representative and solicit recommendations prior to making a final decision. The Committee shall have seven (7) working days from the date of such meeting to provide a written decision which shall include the necessary steps to minimize the likelihood that the individual worker's caseload number will exceed the requisite level and/or how the claim of unmanageable workload will be addressed.
  3. It is further understood and agreed that this letter of understanding and any of its terms as well as Workload Assessment Process is not deemed to constitute in any way either directly or indirectly a right of refusal to work.

This Letter of Understanding does not form part of the Collective Agreement and shall not be the subject matter of a grievance or arbitration, save and except as follows.



### Caseload Level Of Individual Workers

The Society will ensure that an individual worker's caseload will not exceed any of the following levels at any time:

| Function                         | March 31, 2010                         | April 1, 2010                          |
|----------------------------------|--|--|
| Intake                           | 16                                     | 16                                     |
| Ongoing                          | 19                                     | 19                                     |
| Children-in-Care-Family Services | 21                                     | 20                                     |
| Children-in-Care-Child & Youth   | 22                                     | 22                                     |
| Children-In-Care-Adoption        | 22                                     | 22                                     |
| Sr. Child Protection Coaches     | 7 cases when they have 3-4 new workers | 7 cases when they have 3-4 new workers |

This letter of understanding shall remain in full force and effect for the life of this agreement and shall not automatically renew except by express agreement of the parties.

### Workload Strategies to Support Staff

The Society recognizes and values the contribution staff make in the lives of children and families. The Society is committed to an inclusive and respectful environment that promotes and supports the well being and resiliency of staff. In the current environment of change, the Society is committed to implement the following strategies to explore, examine and resolve workload issues that impact on staff:

1. Review the current access model
2. Conduct a workflow analysis
3. Review workload benchmarks and processes for Kinship Care (out of care), Young Parent Workers and Health Specialists
4. Review the roles & work processes of admin support
5. Communication of outcomes to all staff

These strategies will identify the ongoing support needed by staff in order to continue to provide services that result in quality outcomes for children and families.

This letter of intent shall remain in full force and effect for the life of this agreement and shall not automatically renew except by express agreement of the parties.

**Example 2: Developmental Services Language**

For the very first time, workload is a priority in the 2014 round of coordinated bargaining in the Developmental Services (DS) sector; recommended workload language is contained in the DS coordinated bargaining kit for 2014. However, a handful of locals in the sector had already bargained workload provisions even before workload was identified as a coordinated bargaining proposal. Examples 2 and 3 are but two instances of current workload language in the DS sector.

**Language:****CUPE 2597 and Community Living South Huron (March 31 2014)**

- (a) The Employer recognizes that the general question of workload has to be addressed on a continuing basis in order to *meet* the problems encountered by employees in the workplace and to improve the quality of service to the clients of the Agency.
- (b) To that end, the parties agree to establish a Workload Committee.

**Workload Committee Structure**

The Committee shall be composed of an equal number of representatives of the employer and the Union with a minimum of two (2) representatives from each party. Each party shall appoint a co-chair for the committee and will be jointly responsible for establishing the agenda of the committee meeting, preparing minutes and writing such correspondence as the committee may direct. The Employer shall provide to the Workload Committee all pertinent staffing, work organization and financial information necessary.

**Purpose of Workload Committee**

One of the purposes of the Committee shall be to investigate complaints relative to workload issues lodged by employees and to propose remedies to the Employer.

**Complaint Procedure**

Employees who have workload complaints may lodge such complaints with the Supervisor of Human Resources Services. Complaints must be in writing. Within five (5) days after receiving the complaint, the Supervisor of Human Resources Services shall forward the complaint to either of the two (2) co-chairs of the Workload Complaints Committee for inclusion on the next agenda. (Discussion, deliberation and direction of this committee are not subject to the grievance process).

**Workload Committee Investigation Process**

Within one (1) week of receiving a complaint from the Supervisor of Human Resource Services, the Committee shall meet to investigate the complaint. Upon completion of its investigation, which shall not be later than two (2) weeks after the initial meeting to investigate the complaint, the Committee shall forward its proposed remedies in writing to the Executive Director or designate. The Executive Director or designate shall implement the proposed remedies within two (2) weeks unless the Executive Director or designate can demonstrate that implementation of the proposed remedies would result in undue hardship for the Employer.

### Education and Training

Both parties recognize that workload problems may be eliminated through the proper education and training of employees. To that end, the Employer agrees to institute a comprehensive education and training program for all employees at an individual, program and Agency wide level. As well, the Union agrees that all employees will be encouraged to take full advantage of training opportunities provided by the Employer. The Employer will offer and bear the cost of any required certification, licensing or training such as but not limited to Emergency First Aid, Back Care and Non-Violent Crisis Intervention. If an employee fails to take advantage of the training opportunities provided by the Employer, the employee will secure the necessary training at his/her own expense. The Employer will provide the required training minimal of three (3) times per year. In exceptional circumstances where staff are unable to attend the training in their location(s) or with their team(s), they will have the opportunity to take that training at another location/team within the Agency. The Agency will set aside \$3000.00 each year for the purpose of qualifying for funding, prior approval of all courses, workshops and seminars must be obtained from the Supervisor of Human Resources. Applicants may request funding for half time tuition fee of the said course, workshop or seminar, and the employee will be compensated upon the successful completion of the professional development activity undertaken.

### Training Course

The Employer shall post any training courses or experimental programs for which employees may be selected. The information shall be posted on the bulletin boards in all areas to afford interested employees an opportunity to apply for such training.

### Example 3

#### Language:

#### **CUPE 2599 and Sudbury Developmental Services (March 31, 2014)**

The Agency is committed to maintaining a workplace that demonstrates a sincere and continuing interest in the individual and collective well being and recognizes the inherent worth and dignity of each employee. Furthermore, the Agency has the responsibility to provide services through its employees in accordance with the relevant legislation and to conform to Ministry standards and Agency policies. Therefore the Parties recognize the need to address the issue of workload within the Agency.

The Parties agree to develop a Joint Policy/Program on workload shall be reviewed and amended through the Joint Consultation Committee. Points of disagreement may be subject to the Grievance/Arbitration process.

The Parties agree that they will meet through the Joint Consultation Committee and attempt to find a tool or mechanism in which to measure workload within the Agency. It is agreed that the attached proposal will serve as a guideline for the Terms of Reference for the Joint Workload Committee.

**GUIDELINE FOR TERMS OF REFERENCE FOR THE JOINT WORKLOAD COMMITTEE**

Recognizing that workload can fluctuate and should be addressed on a regular basis the Agency will:

1. Conduct Agency-wide reviews on a periodic and as required basis, sharing the results with the Union.
2. Ensure regular ongoing supervision as required.
3. Review the following factors in conducting the equitable distribution and volume of workload:
  - Number of clients in a home/program
  - Number of designated high risk clients
  - Level of client supervision required
  - Amount of required driving time
  - Leaves of absence, vacations and illness
  - Team coverage
  - Service and time demands
  - The needs and resources of the Agency
  - Introduction of new technologies and/or systems

The Parties agree to form a Workload Committee with at least half from representatives of the bargaining unit. The Terms of Reference will be developed by both parties within thirty [30] days of ratification. The committee will have its first meeting within sixty [60] days. Any time spent at such meetings shall be considered as time worked and representatives shall suffer no loss of pay. Issues relating to a significant increase in workload on an individual basis will be reviewed with the employees' Manager. The Manager will address the Issue of workload assignment and volume and provide a response to the worker(s) within seven days. Points of disagreements may be subject to the Grievance/Arbitration process.

**Example 4: Child Care Language**

Example 4 is language that was bargained in CUPE's child care sector in Ontario.

**Language:****CUPE 2563 and Family Day Care Services (December 31, 2014)****Workload**

An employee who believes that their workload has increased beyond what might be considered reasonable shall have the right to ask for a review from the employee's immediate supervisor. Such review to be conducted within ten (10) days of the request. If the employee's concerns are not resolved, the matter will be discussed by the Union/Management committee within thirty (30) days and a resolution agreed upon. A complaint under this clause cannot be the subject of a grievance or arbitration.

**Example 5: Municipal Social Services Language**

The workload language provided in Example 5 is from the Municipal Social Services sector.

**Language:****CUPE 4720.01 and District of Nipissing Social Services Administration Board (January 31, 2015).**

The parties to the Collective Agreement are committed to maintaining a workplace that demonstrates a sincere and continuing interest in the individual and the collective well-being of all staff and recognizes that the issue of workload is a serious concern to bargaining unit members. Further, the Employer and the Union recognize that workload can fluctuate from time to time based on client service demands.

In response to concerns over workload and workflow (processes), the parties agree to establish a Joint Steering Committee to develop a workload/workflow review project. All time spent on this initiative shall be considered as time worked.

The Joint Steering Committee shall be comprised of no more than four (4) designates; two (2) representing the Employer and two (2) representing the Union. Terms of reference will be established for the workload/workflow review project and shall include the following:

1. Project Scope
2. Working Data
3. Key Deliverables
4. Recommendations/Outcome

The Joint Steering Committee shall be established in September 2012, and project planning will commence thereafter. Recommendations from the project will be referred to the Labour-Management Committee for discussion and action as required.

**Example 6: Community Agency Language**

And finally, the language in Example 6 is from the Community Agency sector.

**Language:****CUPE 2221 AND COSTI Immigrant Services (March 31, 2014)**

(The employer) and the Union recognize that workload can fluctuate and should be addressed on a regular basis.

(The employer) and the Union agree to test the following procedure during the life of this Collective Agreement. The viability of this procedure shall be reviewed prior to the end of this Agreement.

Where an employee, or groups of employees, covered by this Agreement has cause to believe that he/she is being asked on an on-going or repeated basis to perform more work than is reasonable within the time constraints provided, he/she must first give his/her immediate Supervisor an opportunity to resolve the complaint by reassessing the needs of the team to determine whether realignment of work assignments is required. If the employee, or groups of employees, is dissatisfied with the resolution, he/she may:

- a)
  - i) Complete a Workload Review Form and submit same to his/her Supervisor as soon as possible, with a copy forwarded to the Union and the Human Resources Officer.
  - ii. The Supervisor will contact the affected individual(s) within three (3) working days of the date of submission to schedule a meeting. Both the employee and the Supervisor may have a representative present. For group complaints, the employees will select one person from amongst themselves to represent them.
  - iii. Following the meeting, the Supervisor will complete the Workload Review Form to advise of the proposed action, if any, and forward a copy of the completed form to the Local Union President and Human Resources Officer.
  - iv. Failing successful resolution, the matter may be brought forward to the Labour-Management Committee for resolution.
- b) Workload Review Form  
Any incident lodged under this provision shall be written on the Workload Review Form, available on the Employer's intranet.

Where the workload is excessive, the Labour Management Committee will review the issue(s) raised and look at a number of ways to relieve the workload issues. This may include the hiring of temporary staff, or other arrangements. Reasonable effort will be made to resolve the workload issue.

### **Checklist**

Please examine the workload language contained in your agreement and use this checklist to identify provisions that are absent in your agreement and areas that need improvement. In addition, bargaining teams may want to consider bargaining favorable agency policies into the collective agreement that match the below.

1. Does management acknowledge that workload is a management responsibility?
2. Does management acknowledge that it is responsible to manage and deal with workload concerns in a proactive fashion?
3. Are there regular workload reviews for employees?
4. Is there an established caseload/workload range?
5. Is there an established caseload/workload cap?
6. Can any employee request a workload review/assessment?
7. Has a Joint Union-Management workload committee been established?
8. Can the Workload Committee initiate a workload review on behalf of an employee?
9. Is there a detailed workload assessment process?

10. Are factors related to workload/caseload taken into account when assigning caseload/workload (e.g. travel, court days, paperwork expectations)?
11. Does the employer have to notify the union in the event of a caseload/workload review, including subsequent follow-up and results?
12. Are protections in place to prevent a workload review/assessment from being used as a basis for discipline/performance evaluations?
13. Can an employee request a workload review/assessment?
14. Are there specific details of the workload assessment listed?
15. Are 'workload triggers' established?
16. Is the supervisor required to meet with employees to address workload concerns?
17. Is there protected time for case documentation / paperwork?
18. Are vacations and other leaves properly staffed and scheduled?
19. Is the employer required to provide workload information to the union?
20. Is workload grievable?
21. Is the employer required to fill all vacancies as soon as possible?
22. Does the employer provide clear expectations of workload to employees?
23. Is there any legislation/regulation around caseload/workload that needs to be followed?
24. Are there policies/strategies to address burnout? (EAP, sick leave/vacation, stress leave)
25. Are there provisions regarding work-life balance?
26. Are casual and part-time employees' workloads/caseloads regulated in a similar fashion to that of full-time employees?
27. Do managers receive training on how to support workers achieve a healthy work-life balance?
28. Does the employer have a jointly developed policy on workload and overwork?

JC/sl:cope491  
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