Committee on Staff Workload

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Purpose
In 2012, the Council of University of California Staff Assemblies (CUCSA), commissioned a staff engagement survey with the goal of understanding the current state of employee engagement at UC Davis and identifying opportunities to improve employee engagement. In that survey, staff reported very favorably on their ability to achieve a work-life balance. However, one of the highest priorities identified in the CUCSA survey for UC Davis to address is:

• Workload and loss of talent/knowledge. Namely, addressing the impact of staffing reductions and retirements on both workload and the loss of skilled employees in institutional knowledge.

Additionally, to understand staff perspectives on workload, it’s important to note the following areas for improvement identified in the CUCSA survey:

• Performance management and recognizing the personal contributions of staff
• UC Davis’ support of career development
• Planning and communication of organizational changes
• Ensuring staff have the equipment, tools and resources to do their jobs effectively
• Ability of staff to communicate their honest views upward
• Inspiring staff to do their best work

At the Chancellor’s request, Staff Assembly formed the Committee on Staff Workload to investigate issues surrounding workload on campus (are staff overworked, why is this taking place, what remedies exist?), and offer UC Davis administration recommendations on efforts capable of positively affecting staff perception of workload. This committee has developed recommendations that fall into four categories – reviewing organizational efficiency and changes processes, employee retention, enhancing communications, and supervisor training. These recommendations support the Chancellor’s Vision of Excellence, particularly in terms of improving the efficiency of the UC Davis enterprise and allowing staff to realize excellence in their endeavors.

The implications of staff feeling unduly burdened by workload can produce significant negative effects including:

• Diminished engagement and increased stress
• Increased tension among co-workers/supervisors
• Feeling loss of control over quality of work
In order to maintain a high-performing staff, UC Davis needs to listen intently to its employees and how they go about their daily endeavors, and take action on reasonable solutions to the workload issue, while keeping staff informed along the way. If engagement suffers, the University risks potentially losing skilled employees and further compounding the workload problem for remaining employees.

**The Process**

In February 2014, Staff Assembly released a four-question survey soliciting staff perspective on their workload. We received 146 responses from individuals whose comments reflect passion, engagement, and concern that efforts are taken to address the workload issue for both the benefit of staff as well as UC Davis.

**Staff Assembly asked the following questions about workload:**

1. What is YOUR definition of workload? Workload is generally defined as:
   a. The relationship between a group or individual human operator and task demands
   b. The amount of work assigned to or expected from a worker in a specified time period
2. What is YOUR perception of YOUR workload?
3. Does YOUR workload include activities/tasks that DO NOT add value to YOUR organization, unit or department? For example, are YOU engaged in tasks that are not efficient, effective or needed?
4. What are some solutions to improving YOUR workload?

**Survey Responses**

**1. Workload Definition**

The majority of respondents, 55 percent, defined workload in terms of the amount of work, assignments, tasks and responsibilities they are tasked with completing. Forty percent of respondents described workload in terms of time, such as work assigned or expected within a specified time period. Some important items to note include:

- Most respondents stated their workloads are assigned by others and in the cases of some, the workloads are unpredictable.
- When describing workload with respect to time, many respondents clarified that the timeframe should be an eight-hour day or 40-hour workweek. Further, work expected to be completed within a “specified time” is an important determinant of whether workload is reasonable.
- Many respondents clarified that workload is the amount of work that can be done “well” or “satisfactorily” and not simply a measure of output.

**2. Staff Perceptions of Workload**

Staff perception of their own workload was fairly evenly divided between manageable and unmanageable. The individuals who reported feeling overwhelmed by their workload generally attributed the issue to:

- Insufficient staffing
- Negotiating inefficient processes/systems
- Last-minute requests/interruptions
- Co-workers delegating assignments

![Figure 1: What is YOUR perception of YOUR workload?](image)
The individuals who reported manageable workloads often provided limited comments apart from acknowledging their workload is manageable, although other comments identified workload as “challenging” and also, having a seasonal element that helps moderate its impacts. Additionally, many comments reflected lament that meeting daily demands prevents them from completing high-quality work.

Some representative comments concerning staff perception of workload include:
- “I think my workload is fair. I don't typically have unreasonable expectations from my superiors.”
- “There are peaks and valleys. The peaks seem to be more constant with very few valleys. When we were compensated w/ CTO for additional hours worked, at least I knew I could recoup some of the time away from family during peak seasons. It makes it very difficult to find the proper balance now and there are consequences, mentally and physically.”
- “Workload standards are quick turnaround with very few resources which makes for reduced quality of work. Expectations at my current workplace are unrealistic given the staff constraints and no additional resources are available to ensure success.”
- “My workload is generally manageable, but just manageable. This is because I am an assertive, frank communicator who asks for assistance when needed and I set boundaries. I spend a lot of my work time managing my supervisor and unit manager--e.g. requesting and initiating conversations, documentation, priority setting, etc. that I believe are their responsibility to initiate. Because I have to be very sensitive and diplomatic about this, it takes a lot of time and I experience loss of productivity because of it. Others in my unit are poor at setting boundaries and poor at asking for help; these folks are chronically overloaded and overworked. Thus, our unit has a high rate of turnover.”

3. Activities Not Adding Value
As with the previous question, staff perception of the value their workload contributes to the University was evenly divided. This topic is of incredible importance given how demoralizing invaluable tasks are to the person assigned to their completion as well as how potential sources of waste may contribute needlessly to staff workload. Additionally, several respondents remarked that the tasks they consider worthless are never discussed with management due to poor staff-supervisor communications. However, many staff responses strongly indicated that their work was essential, and an important service to the University and its constituents.

Some representative comments concerning staff perception of the value their workload contributes include:
- “All that I do is valuable. If the tasks weren't efficient or effective I would say so to my CAO so we could find a way to change it.”
- “All the time. Some are related to interoffice conflicts, poor leadership, and dealing with bargaining units. Other times it is poor execution of new systems (Kuali Financial System) or the lack of tools available to do the job so you do something manually when you know other universities or businesses have figured a way to do it automatically. For some, like the equipment audits, it seems really unneeded and is a product of the need to verify rather than trust.”

Figure 2: Does YOUR workload include activities/tasks that DO NOT add value to YOUR organization, unit or department? For example, are YOU engaged in tasks that are not efficient, effective or needed?
• “I sometimes feel that some of the activities my department has me fulfill are unnecessary but are still implemented because ‘it’s always been that way.’ The problem is that upper management hardly seems to take input of those actually doing the work.”

• “Poor computer systems make my time with proper documentation inefficient. The majority of my workload is needed. I wish I could do a better job with all tasks, but because of time constraints I feel like I often do just ‘good enough’ instead of what I am truly capable of.”

• “I believe that there are many duties that can be streamlined, done differently, or gotten rid of, but there is no time that we can stop, evaluate and make decisions about what should remain and what should be done differently.”

• “No. We strive to streamline and be as efficient and effective as possible for the students. We look at our processes on a regular basis to make sure no time is wasted doing unnecessary or redundant tasks.”

4. Workload Solutions
When asked about possible solutions to workload, respondents overwhelmingly recommended adding staff. Respondents also identified systems and processes related to My Travel, the Shared Services Center, Kuali, Time Reporting System (TRS) and the Purchasing Card as contributors to staff workload. It’s important to note that pay or reclassification surfaced as a significant factor in respondent perspectives on workload, which suggests that views on workload are intertwined with compensation.

Some noteworthy solutions suggested by staff to address workload include:

• “What would help would be user-friendly systems that people who haven't been using them for years (like me) would be able to understand the first time they use it. I think MyTravel is fine but I’m in it 8-hours-a-day/5-days-a-week. For someone who has never used it before it’s hard to use, not easy to follow and confusing. I’m ‘overworked’ when the folks who try to use MyTravel get frustrated with the system, don't want to deal with it and give me their reimbursements to process. The interaction of staff and users on MyTravel is essential to workload. I try to help in training them but that takes away from my job.”

• “Quit implementing new systems without thorough testing and running it side-by-side with a working system. Kuali and SSC have been two extremely large slow-downs and have created unhappy workers as well as unhappy vendors.”

• “We have had a meeting to project map our unit to search for increased productivity. The first session was an excellent meeting where ideas were welcomed and I know this process will help with demands and feelings of stress.”

Figure 3: What are some solutions to improving YOUR workload?
• “I think the more that my supervisor can let me know about upcoming projects and future plans, the better prepared I can be for meeting deadlines, managing my time and prioritizing. That allows me to be better organized so that when things do come up suddenly they don’t derail everything else.”
• “Leaders need to respect that large initiatives or shifts in culture take time and patience. Not every idea is a good one and not every process that takes time is invaluable.”
• “The biggest improvement for us as an IT unit would be the simple recognition that IT is interwoven in virtually every business process that the department undertakes. With that fact affirmed, I think that most solutions would follow: the inclusion of IT in business initiatives at the beginning of their life cycle, the use of system and business and risk analysts to define IT projects more precisely before proceeding to implementation.”
• “More staff members to help bear the workload is the only realistic solution. Otherwise, cutting the workload would be necessary. This would include a lower level of service and elimination of some projects/groups/events. Continuing education opportunities to help stay on the cutting edge of the field may help improve how I deal with tasks.”

Committee on Staff Workload Recommendations
Both in the survey and in one-on-one conversations, staff have largely attributed the workload “problem” to a shortage of staff. However, increasing staffing levels alone is far too one-sided a solution. Additionally, if the workload issue is really a product of a disengaged workforce that feels unprepared, poorly compensated and overwhelmed by their current workload, bringing on more staff merely obscures the underlying issue.

As such, our recommendations focus not on staffing levels, but instead offer possible solutions to systems and policies that affect workload and staff perceptions of their workload.

Review of organizational efficiency and organizational change processes:
• Planning and communicating major organizational changes
  o According to the CUCSA survey, staff, including managers and senior leaders, reported unfavorably on how the planning and communication of major recent organizational changes have been conducted on campus. We recommend revisiting the procedures in place for soliciting staff input on major changes and how that input is actually used. Special attention should be given to the way decisions made by administration impact front-line staff, particularly in terms of their ability to continue offering excellent service to the campus. A positive example includes staff being asked to serve on the Travel and Entertainment group which provides feedback to Accounts Payable and Travel/Entertainment on procedures and other concerns.
  o Continue engaging staff and soliciting their feedback on major organizational changes. However, often staff input is requested but the finished product doesn’t incorporate staff contributions. The administration should proactively offer an explanation when change is realized in ways that contradicts or seemingly disregards staff feedback. Our belief is that staff will accept change and new procedures when they understand the administrative reasons for handling something in a particular way.
• **Address technology and software programs that hinder productivity**
  - Form a Technology Advisory Committees (TAC) for input and recommendations when testing new software and programs and before these are implemented across campus. End-users must be included on TACs and campus constituency groups (Staff Assembly, ADMAN, Academic Federation, and others) should always be invited to represent their constituencies.
  - Organize end-user forums to collect information and share resources related to user difficulty operating campus programs as well as to identify supplemental training needs for users. Allow these user groups to help prioritize the work of programmers and other staff working to create fixes.
  - Eliminate policies and processes that add to workload. Groups such as ADMAN and Staff Assembly can provide examples of duplicative, inessential, and wasteful processes.
  - Reduce the redundancy of back-up documentation required as part of the Purchasing Card process. The current practice requires scanning support documents into Kuali under the user’s file. Eliminating the required 5-year paper trail would remove account managers’ need to store documents without sacrificing the integrity of the Purchasing Card system.
  - Reconstitute the Campus Council for Information Technology (CCFIT); specifically revert to the historic model of two committees – one for academic processes and one for administrative processes. Audit the membership of this group to ensure an appropriate balance of high-level administration and line staff.

• **Enlist Organizational Excellence**
  - As specialists in the field of business processes, [Organizational Excellence](#) should be involved in identifying and documenting common campus inefficiencies, and policies and practices that produce inefficiency. Their findings, which could potentially be replicated by other departments, should be published along with best practices in resolving them.
  - Ask Organizational Excellence to conduct case studies and project mapping of larger academic units (e.g. Plant Sciences), service units (e.g. Facilities Management) and campus centers to determine if they are functioning efficiently, and then report on replicable best practices which other departments and units could implement. Part of this should include a review of how evenly workload is distributed across a workgroup.

**Retain employees:**

- Review the campus “[Equity Adjustment Procedures](#),” for potential problems it creates for retaining staff. Requiring staff to present “specific outside salary offers” to be considered for an equity adjustment is an inefficient exercise for the staff person, their current department, as well as the department making the offer. Further, this process doesn’t allow departments to show the value they place on a given employee, instead forcing the employee to seek out a department that values them more.

**Enhance communications and supervisor training:**

- Establish potentially anonymous website for staff to report workload issues and inefficient practices that wouldn’t rise to the level of a whistleblower complaint. The website could also be used to share ideas and solutions upward. Similar to the way Facilities Management solicits reports of water waste, UC Davis may consider pursuing avenues for eliminating inefficiencies in staff work.
• Mandate conflict management and interpersonal skills-building training for supervisors and managers. Similarly, provide additional training opportunities for staff to improve their skills in communication and conflict mediation, particularly for those who feel unable to voice their concerns, workload or otherwise, to their supervisors.

• Request that Human Resources develop a resource document that outlines the process by which staff can request a reclassification (with or without supervisor approval) and directly receive updates on the status of a reclassification. Changes to an employee’s position and level of supervision should automatically trigger a reassessment by management of that employee’s classification and not left to the employee to negotiate for themselves. While Human Resources conducts trainings on classification upon request, they should proactively contact supervisors with information concerning the importance and process for correctly classifying their staff.