AS ISO 30434:2025
ISO 30434:2023

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Human resource management — Workforce allocation



AS ISO 30434:2025

This Australian Standard® was prepared by MB-009, Human Resources and Employment. It was approved on behalf of Standards Australia's Standards Development and Accreditation Committee on 06 March 2025.

This Standard was published on 4 April 2025.

The following are represented on Committee MB-009:

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This Standard was issued in draft form for comment as DR AS ISO 30434:2024.

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ISBN 978 1 76175 131 8

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First published as AS ISO 30434:2025.

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Preface

This Standard was prepared by the Standards Australia Committee MB-009, Human Resources and Employment.

The objective of this document is to describe a framework of processes, practices and management activities for allocating work to workers. Its high-level principles and processes are applicable to all allocation methods and workforce types. It may be used in all types of organizations and industry sectors, and from small teams to large complex organizations. It applies to all workforce sourcing methods, whether the workforce is made up of internal employees or externally sourced workers.

This document also addresses the relationship between allocation decisions and stakeholders, including operations, finance, human resource functions and, most importantly, workers.

This document explains how to create an allocation framework, design an allocation process and document, communicate, measure and improve the process. It also suggests preventative actions to stop or mitigate undesirable outcomes.

This document does not address —

(a) absence management or planning or timekeeping;

(b) role or skill-based workforce planning (refer to ISO 30409);

(c) labour standards;

(d) training or succession planning;

(e) recruitment (refer to AS ISO 30405 and ISO 30409);

(f) compensation or performance reviews;

(g) health and safety (refer to AS/NZS ISO 45001);

(h) work ergonomics (refer to ISO 6385);

(i) methods of organizing specific types of work (e.g. lean manufacturing, agile project management); or

(j) automation of tasks using “digital workers”, such as physical robots and artificial intelligence bots.

Annexes to this document describe details and foundational concepts of allocation applied in various industries as examples to support the theory.

This document is identical with, and has been reproduced from, ISO 30434:2023, *Human resource management — Workforce allocation*.

As this document has been reproduced from an international document, a full point substitutes for a comma when referring to a decimal marker.

Australian or Australian/New Zealand Standards that are identical adoptions of international normative references may be used interchangeably. Refer to the online catalogue for information on specific Standards.

The terms “normative” and “informative” are used in Standards to define the application of the appendices or annexes to which they apply. A “normative” appendix or annex is an integral part of a Standard, whereas an “informative” appendix or annex is only for information and guidance.

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Foreword

ISO (the International Organization for Standardization) is a worldwide federation of national standards bodies (ISO member bodies). The work of preparing International Standards is normally carried out through ISO technical committees. Each member body interested in a subject for which a technical committee has been established has the right to be represented on that committee. International organizations, governmental and non-governmental, in liaison with ISO, also take part in the work. ISO collaborates closely with the International Electrotechnical Commission (IEC) on all matters of electrotechnical standardization.

The procedures used to develop this document and those intended for its further maintenance are described in the ISO/IEC Directives, Part 1. In particular, the different approval criteria needed for the different types of ISO documents should be noted. This document was drafted in accordance with the editorial rules of the ISO/IEC Directives, Part 2 (see www.iso.org/directives).

Attention is drawn to the possibility that some of the elements of this document may be the subject of patent rights. ISO shall not be held responsible for identifying any or all such patent rights. Details of any patent rights identified during the development of the document will be in the Introduction and/or on the ISO list of patent declarations received (see www.iso.org/patents).

Any trade name used in this document is information given for the convenience of users and does not constitute an endorsement.

For an explanation of the voluntary nature of standards, the meaning of ISO specific terms and expressions related to conformity assessment, as well as information about ISO's adherence to the World Trade Organization (WTO) principles in the Technical Barriers to Trade (TBT), see www.iso.org/iso/foreword.html.

This document was prepared by Technical Committee ISO/TC 260, *Human resource management*.

Any feedback or questions on this document should be directed to the user's national standards body. A complete listing of these bodies can be found at www.iso.org/members.html.

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Introduction

The allocation of work to workers is the one of the most fundamental management tasks and responsibilities in an organization. It has a profound impact on people, the organization's ability to deliver and financial outcomes.

The human resource (HR) function should have a significant role in promoting and driving balanced outcomes. Development and monitoring of an allocation framework and allocation policies, as well as compliance, are essential for good allocation practices to be applied by the organization.

Workforce allocation encompasses a broad range of processes, practices and management activities that address organizational performance, people management and compliance issues. These processes focus on a critical resource – people – and thus significantly influence the social climate and performance of an organization. Decisions resulting from these processes directly impact people's well-being, relationships, motivation and performance, and the organization's overall capability, output and collective intelligence.

Allocation occurs in many ways. Work can be directed by the organization or selected by the worker. Decisions can be made using human judgement or automated tools. Workers can be informed of when to attend shift work, what activity to complete in project work, what job to do, and be appointed to a position or be informed in other ways.

This document recommends good practices common to all types of allocation. It recommends an allocation framework, processes and steps, and explains how to prepare, assign and inform allocation decisions.

Allocation processes follow workforce planning processes that segment the workforce, calculate gaps and plan recruiting, training and transfers (see ISO 30409). Allocation processes generally cease at a level before workers self-manage their work, possibly including decisions on individual tasks. Workforce allocation is a subset of broader workforce management processes and interfaces with absence management and timekeeping processes. See Figure 1.

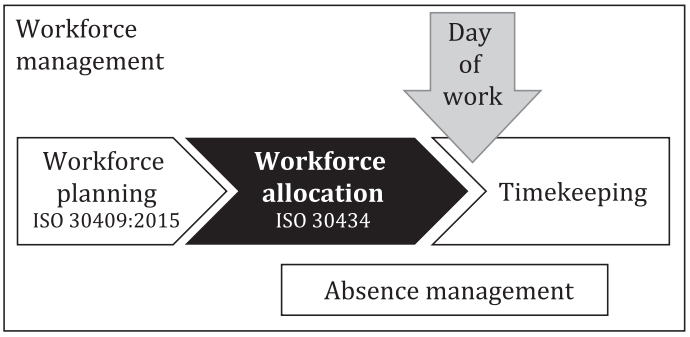


Figure 1 — Workforce management and allocation processes

Effective workforce allocation practices ensure the organization's work requirements are identified and allocated appropriately. The principles of effective workforce allocation are:

a) complying with state and organizational regulations, policies, rules and agreements;

b) ensuring zero harm to workers, whether physical or mental;

c) allocating work with equity and respect;

d) considering options for flexibility in work times and work formats;

e) enabling transparent and fair allocation decisions;

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f) communicating allocation decisions clearly and in a timely manner that enables workers to acknowledge work allocated to them.

Users of this document will include:

1) workforce professionals, including resource managers, workforce managers, workforce schedulers, roster coordinators, allocation coordinators, staffing coordinators, workforce coordinators and workforce analysts;

2) human resource managers;

3) frontline and executive managers;

4) workforce policy makers;

5) project managers and consultants involved in workforce systems and processes;

6) vendors of workforce technology;

7) trade union or employee representatives and employer groups.

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Human resource management — Workforce allocation

1 Scope

This document describes a framework of processes, practices and management activities for allocating work to workers. Its high-level principles and processes are applicable to all allocation methods and workforce types. It can be used in all types of organizations and industry sectors, and from small teams to large complex organizations. It applies to all workforce sourcing methods, whether the workforce is made up of internal employees or externally sourced workers.

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a) absence management or planning or timekeeping;

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e) recruitment (refer to ISO 30405 and ISO 30409);

f) compensation or performance reviews;

g) health and safety (refer to ISO 45001);

h) work ergonomics (refer to ISO 6385);

i) methods of organizing specific types of work (e.g. lean manufacturing, agile project management);

j) automation of tasks using “digital workers”, such as physical robots and artificial intelligence bots.

Annexes to this document describe details and foundational concepts of allocation applied in various industries as examples to support the theory.

2 Normative references

The following documents are referred to in the text in such a way that some or all of their content constitutes requirements of this document. For dated references, only the edition cited applies. For undated references, the latest edition of the referenced document (including any amendments) applies.

ISO 30400, *Human resource management — Vocabulary*

3 Terms and definitions

For the purposes of this document, the terms and definitions given in ISO 30400 and the following apply.

ISO and IEC maintain terminology databases for use in standardization at the following addresses:

— ISO Online browsing platform: available at https://www.iso.org/obp

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