WORK LIFE BALANCE

PILOT PROJECT 2002- 2005

EVALUATION

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1. Introduction

1.1. Background

In 2000 the UK Government began to review options to support parents and employers, with the aim of making it easier for parents in work to balance these responsibilities. The Government wanted to enable more people to work flexibly and sought views on a number of topic areas in this regard. The result of these consultations was the Right to Request Flexible Working Regulations under the 2002 Employment Act.

In Wales, the Assembly Government wanted to promote flexible working in as broad a way as possible both with large and small organisations throughout Wales. Their aim is to embrace all employees including parents. They facilitated this through Chwarae Teg, the leading organisation for the economic development of women in Wales, and the Welsh Development Agency (WDA). The success of these activities led, in 2003 to the Work Life Balance Pilot Project (to be managed by Chwarae Teg) the continuation of the SME Challenge Fund (to be run by the WDA) and the development of the Work Life Balance (WLB) in Wales Website (partnership between Welsh Assembly Government; Chwarae Teg; WDA and ELWa). The funding for all the activities was provided by the Welsh Assembly Government (WAG). This report focuses on the WLB Pilot Project, which was set up to work with large public sector organisations and was managed by Chwarae Teg between April 2002 and March 2005.

1.2. Process

Large public sector organisations were defined as Local Authorities (LA's); Assembly Sponsored Public Bodies (ASPB's) and Higher Education Institutes (HEI). Funding was limited and was to be provided in the form of a human resource over a 3 year period commencing April 2002.

1.2.2.

All those organisations identified in the above categories were invited to apply for assistance from the project. 14 completed applications were received.

1.2.3.

A selection panel made up of representatives from Chwarae Teg, NHS Equality Unit and Welsh Assembly Government evaluated the applications against selection criteria.

1.2.4.

Successful applicants (7) were informed and the recruitment process for Officers to work with them commenced.

1.2.5.

Unsuccessful applicants were informed and invited to join a networking group.

1.3. Organisations Involved in the Project

1.3.1. Bridgend County Borough Council (BCBC)

The Council employs nearly eight thousand staff who can be segmented into sixty-nine different occupational groups. There is a large female workforce many working in part-time employment and whose salary generally falls at the lower level of government pay scales. 46% of the workforce are aged 45 and above.

The Key issues that BCBC wanted to address as part of this project were:

- Allowing staff to balance work to domestic obligations
- Building upon the effective industrial relations climate that exists in Bridgend County Borough Council
- To build upon some of the supportive initiatives already adopted, ie special leave, job share.
- Assist the organisation to move from a 9-5 culture to one which meets the requirements of a more demanding and enquiring public. The need to establish support mechanisms that need to be associated with that.
- To reinforce our commitments that lie within our Equal Opportunities Strategy and to support the key recommendations highlighted in our Human Resources Strategy.
- To be able to retain and attract quality employees to the organisation at a time of demographic change
- Investing in work life balance initiatives as a means to delivering a better quality service.

Their objectives over the 3 year period to facilitate this were:

Year 1:

- To infuse the concept of WLB as part of the Council's strategic policy framework.
- To incorporate Members of the Council as part of a WLB policy forum and also to include partners from outside organisations, ie Chwarae Teg.
- To strengthen the concept of WLB as currently outlined in the Council's HR Strategy.
- To recognise that Members also have WLB issues.
- A survey in Year One to include a questionnaire to employees on issues relating to WLB – for us to understand the issues from those people who are at the front-line and beyond!

Year 2:

- To establish from al those issues in Year One a WLB strategy and a WLB Team which will include Members, champions from within the Directorates, trade union representatives and officers from external and supportive organisations.

Year 3:

- To drive forward effective WLB policies.
- To build upon existing and associated WLB policies and to incorporate a programme of monitoring and evaluation in order to ascertain whether they work effectively.
- An opportunity to return to the WLB Strategy and from One and Two above, establish how we could move forward on the next stage of what is a continuing journey.

1.3.2. Neath Port Talbot County Borough Council (NPTCBC)

In 1999 the Council negotiated a groundbreaking Single Status Agreement with its trade unions which led to the introduction of a 37 hour working week and a commitment to introduce more flexible working practices. As a consequence, NPTCBC implemented a number of flexible working practices.

The Key issues that NPTCBC wanted to address as a part of this project were:

- Develop and implement home/tele/flexi working scheme linked to office accommodation review
- Assist middle and senior managers to reduce average working hours, where currently excessive
- Extend use of existing WLB schemes to manual and craft workers areas where under utilised at present.

Their objectives over the 3 year period to facilitate this were:

Year 1:

- Developing a Homeworking scheme in consultation with the trade unions.
- Consult with managers to determine the reasons for "long hours" culture.
- Consult with employees and publicise scheme availability.

Year 2:

- Pilot Homeworking scheme.
- Develop and implement measures to reduce hours.
- Work with groups of employees/managers to reduce hours.

Year 3:

- Extend/encourage usage of scheme.
- Continue to support/encourage managers.
- Further extend/encourage take-up and publicise success.

1.3.3. Wrexham County Borough Council (WCBC)

Wrexham offer the full range of local government services to people in Wrexham and their mission is to deliver what matters to the people of Wrexham. They define their organisational culture/values as: workforce, honesty and openness, learning and development, Equality and Diversity, Innovation, Delivery, empowerment and accountability.

The key issues that WCBC wanted to address as a part of this project were:

- Recruitment to key/professional roles
- Retention of key groups as above, eg social workers
- Sickness/absence arising from dual demands ie work pressures vs those outside of work

Their objectives over the 3 year period to facilitate this were:

Year 1:

- Formulation of a Steering Group and Project Planning in Place.
- Production of supporting documentation for Managers and Staff.
- Develop Questionnaire to distribute and analyse to establish baseline position. Develop Communication Strategy.
- Clearly identify link to valued workforce initiative (Health, IiP).
- Training for Managers.
- Identify Projects.

Year 2:

- Projects running.
- Clear Evaluation system to be in place.
- Projects to be evaluated and results reported.

Year 3:

- WLB applications that work are rolled out Authority wide.

1.3.4. Countryside Council for Wales (CCW)

CCW is the Governments statutory adviser on sustaining natural beauty, wildlife and the opportunity for outdoor enjoyment in Wales and its inshore waters. It is also the national wildlife conservation authority. CCW staff are predominantly specialists who are enthusiastic about their work on a personal level, which has led to a long hours culture and a perceived workloads problem.

The key issues that CCW wanted to address as part this project were:

- Wider understanding amongst all staff of what is available
- Employer of choice
- Culture Change
- Retention/Recruitment
- Morale
- Sickness absence

Their objectives over the 3 year period to facilitate this were:

Year 1:

- Collect the information and Advertise Services to staff.

Year 2:

- Expand range of services.
- Have smooth system for promulgating information.
- Have statistical information being used.

Year 3:

- Raising awareness of proposed equal treatment, legislation and of cost and benefits to promoting flexible working.

1.3.5. Education and Learning Wales (ELWa)

ELWa was created as an organisation in April 2001(from a variety of training providing organisation merging) and represents the National Council for Education & Training for Wales and the Higher Education Funding Council for Wales. It is the largest ASPB and provides learning opportunities for more than 300,000 learners.

Employment practices were seen as a major contributor to developing the culture to support the organisation's corporate strategy. The defined aim was to "be a model of best practice as an employer, committed to equal opportunities and balance between work and domestic life".

The key issues that ELWa wanted to address as part of this project were:

- Improvement to existing WLB arrangements which are largely non-formalised.

Their objectives over the 3 year period to facilitate this were:

Year 1:

- Formalise and harmonise inherited policies and practices, including those related to WLB.
- Development of a WLB Strategy for ELWa.

Year 2:

- Roll out Flexible Working Hours Scheme across the organisation.
- Continue development and implementation of WLB policies in line with WLB strategy framework.
- Produce action plan to continue staff WLB consultation exercises.

Year 3:

- Roll out of harmonised Flexible Working Hours Arrangement Policy across the Council, post Piloting.
- Continue development and implementation of WLB policies in line with WLB Strategy Framework.

1.3.6. Cardiff University

Cardiff is one of Britain's major teaching and research universities. Located in the Centre of the capital city of Wales. Cardiff's vision is to be recognised as a world-class university and to achieve the associated benefits for its students, staff and stakeholders. The University employs over 5,000 staff split approximately 51% Academic and Research and 49% support staff.

The key issues that Cardiff University wanted to address as part of this project were:

- Full awareness of policies and practices which support and promote WLB are available.
- Increased awareness amongst managers of benefits of such policies and practices
- Determine in future plan for further policy/practice development

Their objectives over the 3 year period to facilitate this were:

Year 1:

- Development and delivery of programme for awareness raising and promotional materials for all staff and some specific staff groups.

Year 2:

- Evaluation of Year 1.
- Consideration of future direction including review of additional policies and practices which may be appropriate.
- Pilot studies to be undertaken.

Year 3:

- Review of changes which have occurred including take-up analysis, promotional materials, evaluation, testing awareness, evaluation of pilot studies of additional policies.
- Report outcomes including recommendations for future direction.

Following 19 months of the project, Cardiff University was to be merged with the University of Wales College of Medicine and the assigned Project Officer left Chwarae Teg's employ. The University decided that due to the impending merger that the project officer was not to be replaced. The University produced an end of project report, which can be viewed at Appendix 1 and www.wlbinwales.org.uk/casestudies/cardiffuniversity.

1.3.7. Trinity College Carmarthen

Trinity College Carmarthen is the oldest denominational institute of Higher Education in Wales, and defines itself as a community University focussing on the creative and liberal arts. The College vision is to create a distinctive and progressive portfolio of provision that creates success for a diverse community of learners.

The key issues that Trinity College wanted to address as part of this project were:

- To devise a policy to achieve consistency across the institution
- To learn from identified good practice drawn from organisation of similar size and complexity.

Their objectives over the 3 year period to facilitate this were:

Year 1:

- To adopt a strategic approach to managing human resources.
- To audit current practice identifying gaps and capacity to implement a WLB scheme.

Year 2:

- To implement the policy across the college.
- To publicise the policy internally and externally in job advertisements and job descriptions.

Year 3:

- The collection of data for monitoring and reviewing the impact of the policy.

1.4. Role of the Project Officer

1.4.1. Background

The funding provided by the WAG was in the form of a Human Resource. Each organisation would be allocated 2.5 days a week of time. This led to the recruitment of 3.5 Full Time Equivalent Project Officers.

The Project Officers were employed by Chwarae Teg who in turn allocated their time to the successful organisations. The reason for this stemmed from Chwarae Teg's experience and success in providing specific assistance to external organisations in this way.

1.4.2. Recruitment

The Jobs were advertised with the following requirements:

- Liaison between the National Assembly for Wales and Chwarae Teg
- Liaison with HR Departments within chosen public sector
- Review/evaluation of existing WLB practices within chosen public sector organisations.
- Development of new/additional WLB practices within chosen public sector organisations
- Plan and roll out the pilot scheme in given public sector organisations.

We were seeking to appoint individuals with

- Knowledge and experience in developing WLB initiatives:
- Effective interpersonal skills
- Excellent communication and presentation skills
- Skilled negotiators with a sound appreciation of network dynamics
- Sound experience of administration and financial systems

A full job description can be viewed in Appendix 3.

1.4.3. The Role

The role required that the Project Officer managed the development of the project within their given organisation. Three full time and one half time officer were appointed to work with seven organisations.

In the initial stages of the project the officers spent at least one full day a week in the given organisations, where a workspace had been provided for them. This assisted in the rapport building and gathering of knowledge for the Project Officer. As the project progressed the amount of time spent physically at the organisation varied according to need.

As will become evident later in this report the Project Officer was key to the successes in the given organisations.

2. Methodology

It was decided that project officers would work on a consultation type basis with the organisations as opposed to following a set pattern. The reason for this stemmed from the variation in size and operations of the organisations involved. As a consequence the way each organisation approached the project differed. This section outlines the six different approaches.

2.1. Bridgend County Borough Council (BCBC)

It was decided that prior to any production of an 'action plan' to progress the Council's work-life strategy there was an essential requirement to engage with as many as stakeholders as possible both within an internal/external framework.

The Council held a firm resolve that there was a direct linkage between Work-Life balance and workplace health. On the basis of economies of scale it was decided that engagement with employees would refer to both issues.

In order to progress, two Member/Officer and trade union working groups were established. These groups being supported by the assigned project officer from Chwarae Teg and a support officer linked to the health division of the Welsh Assembly Government.

It was decided that gaining an understanding of staff perceptions should be the first stage towards progressing both subjects. A number of principles and specific objectives were established as follows:

(1) To identify staff knowledge of health promotion initiatives within the Council

(2) To establish which health promotion initiatives are required by staff now and in the future

(3) To identify staff who have been actively engaged in the Council's health promotion programme to date

(4) To identify current knowledge of Work-Life Balance issues amongst staff and to share knowledge

(5) To establish which Work-Life Balance initiatives are considered the most important to staff

(6) To understand the different work life needs of occupational groups working for the council

(7) To create a programme for the implementation of Work-Life Balance initiatives including prioritising policy

(8) To provide a forum for new ideas

(9) To ensure that outcomes and analysis of staff engaged should be communicated to the Corporate Management Board, the Human Resource Policy Forum, Cabinet Council and employees

In order to ensure a corporate approach to the project including consistency of application, a cross directorate Work-Life Balance group was established including the nomination of 'work-life' balance champions from each of the Council's Directorates, Trade Union representatives, the Chwarae Teg project officer and at the early stages Member attendance. Other officers such as information technology professionals as well as the Head of Communications shared their professional experiences in order to progress the strategy. The group was chaired by the Assistant Director – Human Resources.

Consultation also took place with the Chief Executive, Leader of the Council, Members – Human Resource Policy Forum (including attendance of the Work-Life Balance Project Officer – Chwarae Teg), Directors, meeting with officers in individual service Directorates and the Directorate Personnel Officers Group.

The Council held a view that the role of trade unions within the overall work-life balance strategy was essential. To this effect an accredited one-day training course was delivered by the Wales TUC to all trade union representatives.

It was the firm resolve that personal engagement with staff was a particularly important exercise to undertake in order that an effective work-life action plan could be produced. This was achieved through the following:

- Focus Groups
- Training for focus group facilitators
- Communication
- Questionnaires

The total employee involvement in the focus group programme was 15% of the Council's workforce (excluding teachers and school based staff). The feedback from the focus groups produced the following cross-cutting issues in respect of Work-Life Balance

- Home working needed to be formalised under a corporate policy and consistently managed in all Directorates
- Current flexible working practices did not meet the needs of the workforce or service users
- The current Corporate Flexitime Scheme had in effect become inflexible and to that effect needed to be subject to an overall review
- There was an issue of inequality and inconsistency in the interpretation and application of current flexible working policies and this needed to be addressed
- A change of culture and an element of trust were seen as essential to the success of any new flexible working practices. There was a requirement to establish a structured training programme

- Childcare was seen as an area that could support issues such as staff recruitment and retention
- The introduction of career breaks could be introduced which would support the Council's commitment to account for losing experienced and knowledgeable staff.
- Lastly but not least was the issue surrounding accommodation. Practically all focus groups referred to poor office space and accommodation in general. There were obvious direct linkages between issues of Work-Life Balance and Workplace Health associated with existing staff accommodation arrangements. It was suggested that the current review of Council staff accommodation needed to be completed at the earliest opportunity.

2.2. Neath Port Talbot County Borough Council (NPTCBC)

The Council has always worked in partnership with its trade unions as it believes that his contributes to good industrial relations. The trade unions were therefore encouraged to become involved in the project from the commencement of the project. In addition, elected members have been provided with progress reports and any views expressed have been taken into consideration within the project period. During the project period, links were established and maintained with the Occupational Health and Safety Section to ensure that any publicity generated by that section would include reference to Work Life Balance issues and to the development of the Home Working Scheme.

In the early days of the project, presentations were provided to over 100 female managers and potential managers and publicity has been give to Home working in the Council's Personnel Bulletins, Intranet and on all employees pay dockets. Similarly on-line surveys, poster campaigns, promotional literature and quizzes were arranged to promote flexible working. A Work/life Balance Section was also included on the Council's Intranet.

To take the project forward, a multi disciplinary group was established to develop a Home working Scheme and Policy document. This group consisted of representatives from Personnel, Information Technology and Health and Safety along with the Project Officer.

During the course of the project, flexible working gradually became accepted as part of the culture at Neath Port Talbot and it is considered that the publicity campaign conducted was a significant contributory factor to this acceptance. In recognition of this, the application processes for all of the Council's flexible working policies were simplified and streamlined to remove any possible barriers to the workforce. As a result, a quarter of the Councils workforce is now involved in flexible working in some form.

The Home working Scheme was initially piloted amongst a small number of employees to enable any problems to be identified. Progress was reported back to the Working Group and to elected members on a regular basis. The Home working Scheme is now an accepted policy and is available to the Council's employees. It is anticipated that as managers become used to employees working from home and employees themselves see the advantages, there will be an increasing number of applications. In addition, the Council is currently examining the use of office space and as part of its Accommodation Strategy will be examining whether or not current office based posts can be advertised as suitable for Home working.

During Year 3, the Project Worker assisted the Social Services and Housing Directorate in examining the recruitment and retention problems historically affecting Domiciliary Care Workers. She was asked to examine Work/life balance issues of 126 employees and during her researchers, found issues of concern which were not apparent to senior managers in that directorate. As a result of these findings, the directorate has taken active steps to remove any obstacles to the recruitment and retention of these employees.

2.3. Wrexham County Borough Council (WCBC)

In April 2002, the Council's Executive Board gave its approval to pilot and evaluate specific WLB initiatives that support service improvement, recognising that creating a more flexible workplace would assist employees to become more committed, loyal and motivated, leading to reduced sickness/absence.

The piloting of WLB initiatives was promoted at senior management meetings in each directorate on a voluntary basis. Senior Managers would request a meeting to discuss WLB with their teams and thus any lead was taken by those pro-active managers who wished to experiment with service delivery and flexible working in their teams.

Each team expressing an interest was given a briefing on the background and the options. This was followed up with a Staff Questionnaire to establish a baseline position on service needs, morale and current working patterns.

A Business Case was then created from these answers. The Business Case would outline what the current problems were (if any), what the solution was and why (proposals), and how any problems arising from these proposals would be dealt with. The answers came from the staff themselves. They were encouraged to think creatively and include various options to satisfy staff and service needs. They had to take ownership of their project.

This was followed by an Application Form that was submitted to the department management team for approval. Sickness/absence and turnover were benchmarked for post-pilot comparison with clear evidence to support any successes.

A pilot-project was then implemented and agreed for a set period. It was of paramount importance that service needs were met and, where possible, improved.

Staff had to sign a 'Pilot Agreement' which acknowledged their understanding that they were involved in a pilot project and thus any option deemed not to be working, or any abuse of the system would result in the project being withdrawn at any time, reverting to previous working patterns. However, this never happened and no projects were withdrawn.

50+ projects have been piloted up to September 2005. These projects include the following WLB options:

- Removal of core hours but with compulsory self-rostering implemented;
- Extension of the working day to promote staggered working and extended opening hours
- Weekend Working – as part of the contracted working week and at no additional cost to the Council

- Purchase of Additional Leave – From 1 day to no maximum and for any reasons with a supporting Business Case. Cost of days are spread over a 12 month period
- Compressed Week/Fortnight Working
- Ad-hoc Working from Home – Target and time-specific and promoted as the exception rather than the norm. Assists those staff that do not need to be present in the office when report-writing for example. Self-risk assessments were carried out in the home by individual concerned and records of this kept on file
- Increased carry over of additional hours (over and above usual maximum in Flexible Working Hours Scheme). However, this was capped at a maximum of 21 hours per 4-week period
- Unlimited 'swipes' (in time recording system) for breaks to attend medical or other appointments
- Staggered leave year (for some teams) to avoid the usual end year problem of too many employees wishing to use up their annual leave allocation at the same time etc

The manager's only concern in any project was that service is covered and that the work is done. How and when the work is done is decided by promoting a teamwork approach with negotiations on any time off. Teamwork and self-rostering have without doubt, created the most successful basis for any project and has resulted in increased communication.

It is the case that some staff at the outset felt that they would like to reduce their weekly hours of work, only to find that by working more flexibly with staggered hours, they could keep working full time. Another benefit was that by promoting a team approach, individual requests became fewer and more staff benefited.

The fact that WLB is for all has meant that those without children or caring responsibilities have had no reason to feel resentful or left out.

We have promoted a culture where staff feel valued for the work they produce and for how the service is covered, rather than where they are at any particular time. This involves trust. By promoting this way of working and trusting staff to deliver the service in a way that also assists them to find their WLB, they feel empowered and with empowerment comes increased loyalty to the employer, increased motivation and ultimately increased productivity and service delivery.

2.4. Countryside Council for Wales (CCW)

As with any organisation, we had some initial barriers to overcome:

- That WLB was specifically for women with children
- From managers that the work will not get done
- That team members/individuals would be resentful of others working flexibly
- Issue of trust.

At the very beginning our message was that WLB was for all staff regardless but that there should be tangible benefits for the business.

We started by raising the awareness of the senior management team and unions of the benefits of WLB. We knew if we had their support that this message would filter down to line managers who would have a licence to 'think out of the box' of how they could implement WLB for their staff and teams on a pilot project basis.

Every team or individual was given a questionnaire that asked whether they felt that service needs were being met by CCW working patterns and what working patterns would assist staff to find their own WLB. A business case was then created from these answers.

Each business case identified what the current problem was, what the solutions was and how would problems arising from the proposal be dealt with. The answers came from the staff themselves. They were encouraged to think creatively and include various options to satisfy staff and service needs – they took ownership for their project.

A pilot project was then implemented and agreed for a set period. It was of paramount importance that service needs were met and, where possible, improved.

50+ projects have been piloted to date. These projects include:

- Removal of core hours with self-rostering implemented (2)
- Extension of the working day to promote staggered working and extended opening hours(20)
- Term-Time Working (1)
- Purchase of Additional Leave (20)
- Phased Return from Maternity leave (1)
- Compressed Working (7)
- Designated Home Worker (1)
- Ad-hoc Working from Home (12)

Not one project was withdrawn through inadequate cover or abuse and all projects were extended. The initiatives are now policy.

Such was the success of the questionnaire and business case approach to the pilot schemes, that we are implementing this procedure for all future WLB requests.

Our approach requires staff to think about their request and the impact on service, rather than placing the onus on the manager who may have to sometimes make the difficult decision of 'who gets what'. The manager's only concern should be that service is covered. Staff felt this 'collective bargaining' approach is much fairer and it provides a successful basis for projects and results in enhanced teamwork and communication.

The fact that WLB is for all, has meant that those without children or caring responsibilities have had no reason to feel resentful or left out. As long as service needs are covered through team negotiation, CCW staff may use WLB for anything they like such as a hobby, playing sport or shopping.

We have promoted a culture where staff are valued for the work they produce and how the service is covered, rather than where they are at any particular time. This involves trust. By promoting this way of working, and trusting staff to deliver the service in a way that also assists them to find their WLB leads to empowerment; with empowerment comes increased loyalty to CCW, increased motivation and increased productivity.

Sickness/absence, turnover and productivity were benchmarked at the start of all pilot schemes and used for comparison post pilot. Evaluations were conducted at regular intervals to check that staff were happy and that service needs were being met. The beauty of running pilot projects was that if one was not working well or was not required, it was changed to suit.

Some staff at the start of a pilot felt that they would like to reduce their weekly hours of work, only to find that by working more flexibly with staggered hours, they could keep their full time hours. Another benefit was that by promoting a team approach, individual requests became fewer and more staff benefited.

2.5. Education and Learning Wales (ELWa)

To drive forward The National Council (NC)/Higher Education Funding Council (HE) commitment to creating a work environment, which recognises and embraces the diversity of its employees, it developed the Diversity Strategy. The Diversity Strategy consists of policy initiatives in three key areas: Work-Life Balance, Equal Opportunities, and Health at Work.

To take the Work-Life Balance policy initiative forward, a multi disciplinary team was established. This team – the Work-Life Balance Group (WLB Group) consisted of representatives from directorates and locations, Human Resources, Public and Commercial Services Union (CPS) and the Chwarae Teg Project Officer.

The WLB Group were guided by HR Committees and conscious of the need to balance the provision of equality of opportunity for all in the pursuit of work-life balance and achieving consistency of approach across the organisation, against the need for proper management and accounting systems.

Whilst achievement of consistency across the organisation was a key consideration the Group acknowledged that the HE and National Councils may wish to adopt their own policies following implementation of the Rawlings Review, one of the these being in relation to flexible working.

HR Committees approved the following recommendations from the WLB Group

- Implementation of the Flexible Working Arrangement policy. This was developed to meet the needs of Employment Act 2002 – but the provision for right to request flexibility on working patterns was extended to ALL staff
- Piloting a flexible working scheme – Working Hours Arrangements (WHA) Scheme in the Swansea Office over three months period
- That an evaluation of the Pilot, be submitted to the HR Committees' meeting in September 2003, with recommendations for full implementation or modifications to the proposals reflecting the findings of the evaluation.

The WLB Group acknowledged that the system proposed would be based on trust, and felt that the Scheme's criteria offered a sufficiently robust framework for flexible working for managers and staff to work within.

Training and guidance of managers and staff in the expectations and operation of Flexible Working was anticipated as key to its success. This was undertaken in liaision between the HR and Training and Development sections and the WLB Project Officer.

Other developments included:

- Home working policy
- Supporting managers through the training and development – 'Workable Solutions: Helping Managers develop a framework for Work-Life Balance' has been developed in partnership by Chwarae Teg and Wales TUC. The training programme content has been piloted by ACAC and the programme has been achieved endorsed award status from the Institute of Leadership & Management (ILM), the first to achieve this in UK.

2.6. Trinity College Carmarthen

A steering committee was established to drive the initiative forward, to identify individuals and roles and to provide direction, momentum and support. This was deemed essential being mindful of the numerous competing pressures in a small College. The committee comprised of the Director of Operations & Resources, the Faculty Head endowed with central responsibility for Diversity issues, Personnel Officer, Project Officer and the Health & Safety Officer. Other individual were to be co-opted whenever necessary or appropriate. On a day-to-day basis the Personnel Officer, Personnel Assistant and the Project Officer would be responsible for directing the project.

It was recognised that WLB needed to have a broader focus across the College and the newly established Equality & Diversity Committee which comprises of cross College representatives was selected as an appropriate committee for the WLB Steering Group to report to.

Strong emphasis was placed on communicating initial information about the pilot project. Presentations were made to the Senior Management Team, followed by a global email message advising staff about the project and announcing the arrival of the Project Officer. Notification was included about contact details and the availability of the Project Officer. A universal college newsletter provided further conduit for globally communicating the message.

One to one meetings were held with each of the trade union representatives and line managers to raise awareness of the pilot project and WLB in general. This was followed by a questionnaire distributed to all staff with an overall return of 51%. The results of the questionnaire were integral to the review of old WLB policies and the introducing of new policies. Staff awareness sessions were arranged and a number of focus groups were established e.g. Return to work focus groups; flexible working focus group, home working focus group and a wellness focus group which was seeking to link outside the college into the community via the occupational health department of the County Council.

The Project Officer was invited to take part in staff induction programmes. It has become established practice that WLB features within all induction programmes and continues, as an integral part of the induction programme, post exeunt the Project Officer.

A standing agenda item in Equality and Diversity committee meetings provided the opportunity for the WLB Project Officer to deliver regular update reports to the Equality and Diversity committee. These reports radiated further into the College through circulation to the main committee of the College the Academic Board. This is now established practice and continues post pilot project.

At Trinity the Project Officer was not considered to be the main WLB champion but the role was seen very much as a facilitator. Additionally the Project Officer was seen as the conduit through which research about WLB implementation best practice from other organisations could be transferred to Trinity. The Steering committee felt that it was important for the College to 'own' the WLB process and that it should not become centred around one individual and then dissipate when the project ended. It was felt also that WLB should be integrated into other strategic development within the College so that WLB could become embedded into the culture of the institution rather than embodied in one person.

At the end of the project a WLB booklet was formulated with all existing and new policies included, this was seen to replace the original Family Friendly policy. This was placed on the college intranet and distributed to all departments and libraries for ease of use by staff. WLB is mentioned in job advertisements and the WLB booklet is given out at staff inductions

3. Outcomes & Achievements

The aims and objectives for each organisation were outlined in Section 1 of this report. Detailed below are the outcomes and achievements for each organisation.

3.1. Bridgend County Borough Council (BCBC)

Working from Home Policy & Pilot Programme

- Awareness programmes "Commencing Homeworking" undertaken with Pilot Volunteers and Line Managers.

Review of Council's Corporate Flexitime Policy

- Removing barriers which negate against flexible working i.e. elimination of core hours – extended bandwidth
- Revised scheme introduced September 05 for 12 month pilot
- Increased the amount of accrued flexi leave that can be take in any 4 week accounting period
- Increased the credit that can be carried over from one accounting period to the next

Childcare Provision (Childcare Voucher Scheme)

- Scheme available to employees from September 05

Special Leave Arrangements

- Revised policy established

Informing all new employees of Council's work-life balance programme and policies

Incorporating of Council's WLB initiatives as part of employment advertising job packs

- Candidates applying for posts were influenced by policies and procedures in relation to WLB issues

Communications

- Staff have indicated that the invite to attend focus groups engagement on WLB issues has given them a feeling of being valued as well as the opportunity to contribute to policy development

External recognition

- The Wales Audit Office have commented that the Council's Work-Life Balance strategy has been a fundamental support to the more effective management of attendance across all council services.

3.2. Neath Port Talbot County Borough Council (NPTCBC)

- Introducing a Home working scheme/Policy
- Provide greater publicity for WLB schemes to manual and Craft workers
- Cultural Change from scepticism to acceptance that WLB is the way forward in the modern working environment
- Change of attitude will have a major impact on new office complex project

3.3. Wrexham County Borough Council (WCBC)

- Each project was evaluated informally after 3 months and formally after 6 months
- Projects were measured against the original pre-pilot figures. In all cases, productivity remained the same or had improved. Extended service was promoted in each project, eliciting feedback from customers to ascertain how the service was running and how it had improved
- Staff morale was also measured; staff writing down their comments as to how it felt to work more flexibly
- Recruitment, retention and sickness absence turnover in Social Services stands at 7.1% compared to a national rate for Social Services of 14.1% (Social Services Workforce Survey 2003, Employers' Organisation). WLB is regarded as giving us the 'edge' in this respect
- The Council as a whole is now less often in the position of having to re-advertise jobs, or of failing to fill key positions. These positive trends are greater within Social Services, although some specific difficulties remain, particularly within groups in the Department, where we have yet to extend WLB to, such as residential and day care groups.
- Across all projects, turnover has reduced from an already relatively healthy 7.6% (compared to local government as a whole's 13.5%), to 4.1% in the calendar year 2004.
- In the same period, sickness/absence across all the projects has reduced from 5.23% (in Year 1) to 4.4% for the most recent 12 months' period (calendar year 2004)
- Reductions (as a consequence) in overtime expenditure
- Increased turnaround of cases and responses in Benefits Service
- Greater ability to balance childcare and work responsibilities (eg, through use of homeworking)

Examples of service achievements and of improvements for employees include the following:

- (Food Safety) inspection programme is up to date with overdue evening inspections tackled; and out of hours work and late meetings more easily accommodated
- Extended public/client contact hours with service (ie outside normal office hours)
- Better cover of service in the pilot staggered leave year terms for the financial year, as more people present at the end of the holiday period ie, March
- Employees' greater ability to balance personal and work commitments has been achieved through a significant extension in the number of flexible working practices, compared to those available prior to this programme being introduced. These have included the removal of core hours (but with self rostering), extension of the working day and excess leave

3.4. Countryside Country for Wales (CCW)

- Turnover is lower than pre-project and sickness absence is starting to reduce
- Because less staff leave, less money is spent on training and recruitment costs
- Publicising our WLB approach when advertising jobs helps to attract good quality staff
- Staff want to work for us because we have a reputation as a 'good Employer'
- As many men as women benefiting from our policies
- WLB has complemented our work as an Investor in People
- We have the Level 5 Green Dragon Award, the first in Wales. WLB can contribute to sustainability in that if managed properly, it can reduce travel to work and save on office heating and space
- Staff on projects have felt empowered by the self-rostering approach. They also feel more committed to an employer that shows how much it values staff
- WLB is seen as positively influencing employee health, especially in reducing stress
- Staff report that Workload Management is no longer an issue when working flexibly
- Having the policies in place ensures sustainability
- We have a good system now for flexible working requests using the questionnaire and business case document
- All staff have got the message that WLB is for all and here to stay
- WLB is promoted internally on a regular basis through Newsletter and the Intranet

3.5. Education and Learning Wales (ELWa)

- Review of policies and harmonisation of terms and conditions including agreement to and implementation of policies that support WLB
- Agreement to Diversity Framework
- Development of WLB Strategy
- Development, Pilot and roll-out of Working Hours Arrangement Scheme
- To support roll-out awareness sessions delivered to all staff
- Implementation of Working Hours Arrangements Policy for all staff
- Flexible Working Arrangements policy extended statutory provision for right to request flexibility on working patterns to all staff
- Revised profile of WLB within Council
- Inclusion of questions on WLB within Staff Attitude Survey
- WLB dedicated intranet webpage launched
- Training and development of Managers through Workable Solutions

3.6. Trinity College Carmarthen

- Staff survey to ascertain existing knowledge and awareness
- Guidance notes re-issued around the existing flexitime scheme, resulting in extension of the scheme to all support departments
- Development of a home-working policy ongoing recognising that the range of work patterns in an HE institution will not lend itself to a one size fits all policy
- Absence Management Policy introduced
- Review of all WLB related policies undertaken
- Family Friendly policy replaced by a WLB policy for all.
- WLB policy placed on intranet and easy to access areas for staff
- WLB an integral part of job advertisements, inductions and appraisals
- College commended by Higher Education Funding Council on the inclusion of a specific WLB action plan within the HR Strategy
- Implementation of WLB policy

The outcomes and achievements listed here are summaries for a more indepth analysis please contact Hayley Dunne on 029 20 478912 or hayley.dunne@chwaraeteg.com or visit www.wlbinwales.org.uk/casestudies and click on the relevant organisation.

4. What Worked Well

- The role of the Chwarae Teg Project Officer was instrumental in progressing the agenda in all organisations
- Effective linkage between the role of the Project Officer and other stakeholders cannot be over emphasised.
- Collaborative approach with employee representative groups and establishing a work life balance working group with officer and trade unions representation
- Work Life policies relating to flexible working appear to have influenced the production of other policies
- Partnership approach with trade unions
- Relationship between Organisations involved and Chwarae Teg
- Giving fair and equal treatment to all staff regardless of personal circumstances
- Following through on projects quickly, having raised expectations
- Allowing any team/individual to put forward a proposal for a pilot project
- Benchmarking to measure success
- Ownership projects by staff
- Use of Questionnaire and Business case to make the staff think about what they were proposing
- Advertising all existing policies and new proposals at an early stage
- The Team Approach
- Having a WLB Champion, someone in a senior position within the company who advocates flexible working and leads by example
- WLB strategies and policies forming a key pillar of the wider Diversity strategy
- Piloting Initiatives
- Use of a variety of media to promote WLB messages
- Ability to network with other pilot organisations.
- Focus groups and awareness raising sessions

5. Lessons Learnt

- Implementing a WLB strategy takes time
- Timescales for implementation need to be realistic
- The size and structure of an organisation can present challenges when implementing human resources policy
- Early awareness raising sessions for managers on the work-life concept could have helped alleviate initial concern
- Introducing elements of work life balance policy through a pilot programme e.g. home-working, may have been more advantageous than engaging the whole corporate body
- Management of Chwarae Teg staff changes – circumstances where Project Officers' left and the delay through circumstances beyond Chwarae Teg's control of appointing new staff
- Over dependance on working groups delaying decision making
- Benchmarking – productivity was difficult to measure for some
- Informal flexible working practices can lead to different interpretations leading to inconsistency of approach
- Performance Management has to be dealt with in the appropriate way and not through WLB
- Supporting and training managers in the application of WLB is imperative
- Early engagements with Senior Managers results in a higher level of commitment
- Increased physical presence of project officer/WLB champion can enable better monitoring of pilot projects
- Earlier use of dedicated intranet communication tool could have provided a stronger focus for communication on the work and outputs of the project
- The need for clarity for terms of reference for working groups and the roles and responsibilities of group members

6. Best Practice

- Introducing, operating and implementing work-life balance requires collaborative working and is very much an holistic process
- Early buy in by senior management to the strategic benefits of work-life balance is essential, as is a willingness to take risks by senior members of the organisation
- Integrating work life balance issues into the organisation's management development programme is advisable if not essential
- 'One size' does not fit all, the process of introducing, operating and implementing work life balance has to suit the organisation
- Work life balance is an ongoing process. Service provision and delivery, together with organisational change and structure will determine the WLB agenda in a given organisation
- Nominating WLB Champions in the organisation to progress WLB
- Use of internal communication systems as 'one stop shop' to promote WLB
- Benchmarking against similar organisations
- Extension of 'Right to Request Flexible Working' to all employees
- Ensuring that policies are sustainable
- Keeping any application process for flexible working simple
- Delegating responsibility from working/task groups to nominated individuals
- Collaborative approach between management and Trade Unions assists with the process of introducing new initiatives
- Use of a questionnaire to form the basis of any business case for WLB, which encourages staff to consider their request carefully paying attention to what they want, why they want it and the benefits to service
- Piloting new initiatives first to see if they work – changing them if they don't and extending them when they do
- Removing core hours and implementing self-rostering – demonstrating trust
- Assisting managers to manage remote workers by agreeing targets and deadlines
- Promoting core team meetings where time off is negotiated and agreed between all staff
- Keeping Personnel staff involved each time new projects are formulated so that they are able to make any adjustments to time-keeping and other systems
- Producing a generic guide to WLB for Managers – a WLB Pack, that includes sample Business Cases, Staff Questionnaires and Application Forms
- Where HR is operated as a delegated function rather than a central function, nomination of WLB Officers in the delegated HR teams
- Having a WLB section in the Staff Handbook
- WLB is best embedded if it forms part of the overall HR strategy

7. Sustainability

Work Life Balance, as previously highlighted, is not a quick fix and for it to be sustainable in an organisation, the pilot project found the following to be essential:

- Commitment form the 'top' ie Senior Managers
- WLB Champions amongst teams to keep the work high on the agenda
- Embed the WLB agenda into the HR strategy
- Nominate WLB champions in HR Teams
- Train Managers and staff in the use of WLB policies
- Involve staff at all levels of discussions and encourage ownership
- Develop policies
- Monitor and evaluate the process regularly to ensure that what you're doing is working and benefiting the business and staff. If it's not change it
- Keep WLB 'live' by continuously monitoring, evaluating and changing where appropriate

8. Conclusions

The Pilot Project funded by WAG and managed by Chwarae Teg, as evidenced by those involved has been successful in assisting those organisation's and potentially 20,000 employees to better manage their Work Life Balance.

All the organisations involved in the pilot project have overcome challenges and thought differently about the issue to enable change. All organisations have seen a change in attitude by managers and staff to WLB as a consequence of the project, and have shown that working flexibly provides tangible benefits to employers and employees. It is an aid not an hindrance to managers, creating an opportunity to focus on service improvement. WLB also:

- Promotes team-working, autonomy and trust
- Staff being happier at work. Writing a Business Case and planning their own work roster makes some staff feel more in control of their work and therefore more responsible and more productive
- Service users are given a better sometimes over extended opening hours
- Enable parents to juggle their work and family time and be happier in work and therefore at home. In some instances it has reduced stress levels for staff to an acceptable level and they have been able to stay in a job that they enjoy.
- Assist with external values eg Employee Health, IiP and Green Dragon schemes

As the Project has progressed, all organisations have seen a growth in confidence in understanding the principles of Work life balance, which has and continues to mean that these organisations will continue to use WLB to assist with:

- The recruitment and retention of staff
- Increasing staff morale, confidence and loyalty
- Reducing of stress, absenteeism and staff turnover
- Creating a valued workforce
- Becoming an employer of choice

Appendix 1

Work Life Balance Pilot Project, Cardiff University

Report: 31 March 2004

1. Background

The appointment of a Project Officer who joined in September 2002 marked the beginning of the Project. That individual has resigned wef 31 March 04, which is 19 months into what was planned as a three-year (36 months) Project. In reviewing the progress made, this paper ***recommends*** that the Project Officer ***should not be replaced***.
The reason for this recommendation are positive, in that much has been achieved in the period to date; the work has reached a natural break-point, and crucially, developments within the University are such that the outcomes of the work to date will anyway be assimilated into important policy development and implementation activity.

2. Review:

a) Formative stages of the Project:

Some difficulties were experienced by all parties: the University, Chwarae Teg, and the Project Officer, as each sought to come to terms with the operational practicalities of how the work should be undertaken: what precisely would be done/by whom/how.
As a learning point from this "pilot" exercise, much closer detailed discussion between the host organisation and Chwarae Teg might ease this aspect(Note: this observation is NOT made by way of criticism, it is the benefit of hindsight which enable the comment to be made; the parties had common expectations at the overall level, the difficulties related to very practical action points.) Clearly, every organisation will begin a Project like this from a different starting point, reflecting the stage of development within that organisation, but at the same time, there have to be common themes between different participant organisations which the provider must sustain.

An Action Plan was agreed on 23 January 2003, but it would be wrong to view the intervening period as "wasted", it actually provided an important "orientation" phase.

b) The calendar year 2003:

By April 03, a Report was produced, to present an analysis of Cardiff University's policy provisions in comparison with other leading UK universities, based on the Project Officer's reading of a HEFCE report.

As might be expected, Cardiff's position in relation to the policy provision varied, with confirmation of being in the vanguard in some areas, consistent with the majority in others, and with room for improvement or completely missing in yet more. However, it has to be said that some of these conclusions are inconsistent with the internal understanding of policy provision, and the original report on which the analysis was based had itself been overtaken by changes in the law.

In October 02, an analysis was produced showing the responses of a sample of Cardiff University staff to a questionnaire designed to probe the level of (a) understanding of the existence of these policies, and (b) perceptions of the operation of these. 861 questionnaires were distributed to all of the people working within a selection of six Departments. The Project Officer met individually with the Heads of those Departments.

106 questionnaires were returned, which is 12% and probably too low to provide significant findings. The Project Officer was trained in the appliation of SPSS, a statistics-analysis package. The general conclusion that, among the people who did respond, there is only patchy awareness of policy provision, is a message which can be taken forward.

The Survey Report made three Recommendations, the first of which was "Further research in the form of Focus Groups", which was then the topic of a Paper proposing the implementation of this idea, drawing on experience gained from elsewhere in the Wales-Project. (Dec 03). Regrettably this idea progressed no further.

c) Cardiff University's situation:

The merger with the University of Wales of Medicine has been identified throughout 2003 as creating an opportunity for the outputs of this Project to influence the development of policies for the new, merged institution, which work is ongoing.

Conclusions:

1. Cardiff University sets a value on its continuing participation in the Project
2. That value is best gained from networking and sharing knowledge through the Chwarae Teg Steering Group
3. The "output" documents created to date are useful in informing internal policy-development and implementation considerations.

Alastair J.K.McDougall
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CARDIFF UNIVERSITY
140404

Appendix 2

Case Studies – there are many case studies to be found in all organisations involved and these can be viewed at www.wlbinwales.org.uk. This section highlights what the project has meant for employers and employees

For employees the pilot project has meant:

- " I am able to work longer hours and be more flexible with appointments and visits to service users out of hours"
- "Less stress, pressure means I can concentrate on work rather than juggling work/home"
- "Increased degree of autonomy and 'feel good'factor"
- "Being able to choose when to take WLB"
- "Significantly enhanced family life. Generally it has helped the team work together better"
- "Flexibility has improved the working conditions"

(All above quotes from WCBC Staff Comments)

- "The pilot flexitime scheme gives me the freedom and flexibility to work and fit my family's needs around work. It means that I am able to leave a little bit earlier a couple of days a week to pick my two children up froms school and it is useful to be able to use this system to take my two children to school one day a week, when my husband is unable to. I would definitely consider flexitime to be a perk of the job. I have never worked anywhere where we have had the chance to arrange our working life around our family life – it's a wonderful system! I have had full support from my work colleagues, it takes flexibility from everone in the department for the system to work", Sarah Mehta, telephonist and receptionist.

- "Being home based two days a week means I avoid up to a total of three hours in travelling time alone. Getting this time back means I can get through all the reports and documents that I need to read that might otherwise end up in a pile. Working at home allows me to better plan my work in as much as I concentrate on report writing, work to tight deadlines and complete the necessary reading and research aspects of my particular post. In the long term, this supports better outcomes. At the end of a day I feel less stressed as a result of having peace, quiet and time to think", Sarah Atkinson, Adult Services, Personal Services.

- "My ad hoc home working arrangement allows me the flexibility to better manage my home and work commitments – no mean feat with a busy job and four children. Having a team to manage means that the amount of times that I use the home working arrangement is very limited. However, knowing that the flexibility is available when I need it makes for a much less stressed life. For me, the ad-hoc arrangement makes for the ideal combination of 'quiet' time when I can concentrate

on writing reports and meeting deadlines and time in the office to deal with issues and attend meetings", Nicola Evans, Business Manager – Financial Services

(all above quotes from Bridgend County Borough Council)

More staff have access to:

- Purchase of additional leave
- Flexible working
- Term time working
- Compressed hours working
- Working at home
- Phased return from maternity leave
- Annualised hours

For employers the pilot project has meant

- "more hours spent in the office during busy periods, more productivity, allowing deadlines to be reached/results achieved"
- "Improved motivation, better time management"
- "The office is covered for a greater period of time, less overtime claimed, less sick leave, no staff turnover"

(All quotes from WCBC Managers)

- Being shortlisted fro 2005 Working Families Innovation Award for WLB (CCW)
- Being awarded a 'Social Care Accolade' from the Minister for Health for 'Improving Recruitment and Retention in Social Services (WCBC)
- Better equipped managers through provision of "Workable Solutions" training, aimed specifically at managers in the implementation of the organisations' WLB policy
- WLB being embedded in the organisation's Corporate strategy
- Development of WLB specific policies
- Less staff turnover
- Improved morale, productivity
- Reduced costs in relation to recruitment and retention
- Less sickness absence
- Becoming an employer of choice

Appendix 3

Project Officers Job Description

JOB TITLE	WORK LIFE BALANCE PROJECT OFFICER
DEPT/LOCATION	SOUTH EAST WALES, SOUTH WEST WALES AND NORTH WALES
REPORTS TO	ACTING WORK LIFE BALANCE PILOT PROJECT MANAGER
SALARY	

MAIN PURPOSE OF THIS JOB

- To assess current work life balance practices in : Successful Organisation's name inserted here
- To develop additional work life balance practices in these organisations
- To plan and roll-out a pilot scheme(s) to enhance/improve work life balance practices in these organisations

KEY RESULT AREAS

To:

- Provide a link at a senior level between the National Assembly for Wales and Chwarae Teg, especially in relation to work life balance issues
- Work closely with HR departments and Unions in relevant public sector/HE organisations
- Assess current work life balance practices
- Develop new work life balance practices for the individual organisations(s)
- Advise on roll out of an appropriate scheme aimed at improving/enhancing any existing practises or develop new scheme
- Negotiate and influence at all levels
- Report to all interested parties on a regular basis – written and verbal
- Assist in developing networks of work life balance public sector organisations
- Contribute to Public Relations for work life balance initiative
- Effectively participate in team to achieve targets and assist in developing ongoing strategy for work life balance in Wales
- Carry out all administrative function relating to above

OBJECTIVES

- To assess current work life practices in given public sector organisations
- To develop additional work life balance practices in given public sector organisations
- To plan and roll out pilot schemes to enhance/improve work life balance in given public sector organisations

PERSON SPECIFICATION

Experience

- Experience of policy/project development
- Experience and understanding of the Public Sector/HE and/or other large organisations, including Trade Unions, would be a distinct advantage

Skills

- Proven analytical skills
- Proven time management, organisational and administrative skills, including computer literacy
- Effective written and verbal communication skills
- Proven negotiation skills
- Ability to influence and establish effective relationship at all levels
- Presentation skills
- Facilitation skills
- Policy drafting skills

Knowledge

- Commitment to and understanding of Equal Opportunities issues
- Knowledge of employment policy or Human Resource development
- Knowledge of Investors in People would be a distinct advantage

Acknowledgements

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