WORK LIFE BALANCE

PILOT PROJECT 2002- 2005

EVALUATION

EXECUTIVE SUMMARY

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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 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 managed 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. Role Of the Project Officer

1.2.1. Background

The funding provided by the WAG was in the form of Human Resource. Each organisation was allocated 2.5 days a week of time. This led to the recruitment of a 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.

1.2.2. Recruitment

The Jobs were advertised with the following requirements:

- Liaison between the National Assembly for Wales and Chwarae Teg
- Liaison with HR Department 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 presentations skills
- Skilled negotiators with a sound appreciations of network dynamics
- Sound experience of administration and financial systems

1.2.3. The Role

The role required that the Project Officer managed the development of the project within their given organisations. 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.

2. 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 union 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 of 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

3. 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 dependence 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

4. 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

5. 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 from 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

6. 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
- Leads to 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
- Ensures service users are given a better service sometimes over extended opening hours
- Enables 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.
- Assists 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 stress, absenteeism and staff turnover
- Creating a valued workforce
- Becoming an employer of choice