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| Guidelines WORK LIFE BALANCE | Issue Date 28 JANUARY, 2004 |
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Work Life Balance is a Government initiative to introduce flexible working patterns in the workplace so that employees can more easily balance their working lives with their home life. There are many potential benefits which include improved employee satisfaction and morale, lower turnover and reduced absenteeism.

Following a staff attitude survey, Merton won a first round Challenge Fund bid to pilot work life balance, financed by [UNISON](#),

A review of the Merton pilot was carried out by Price Waterhouse Coopers. They concluded that it had demonstrated good practice and it received national acclaim at the Price Waterhouse Coopers Work Life Balance Fund Fair in September 2001.

If you want to talk to individuals who have already piloted Work Life Balance please refer to the [list](#) at the end of this handout.

You should also refer to the London Borough of Merton Work Life Balance Toolkit for more detailed information

<http://intranet01/LBMintranet/specialprojects/worklife/acrobat/Worklifa.pdf>

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SCOPE

This document is for reference purposes for all employees who may be considering the viability of using a Work Life Balance solution in their department, section or division. It is aimed at all levels of employees.

The purpose of this material is to help prepare you to think in a structured way about how Work Life Balance might work in your department

Discussions about the possibility of utilising Work Life Balance should be held on a team basis with full consideration given to how proposed solutions could enhance service delivery and how each member of the team might be affected by suggested changes.

A definitive set of instructions cannot be given as each situation will be different and needs to be handled as such. These materials **will** give you some ideas about how to move forward and highlight key decision points.

RANGE OF WORKING PRACTICES

The pilot groups at London Borough of Merton have built on existing practices already in place. For example, we already operate flexi-time which is based around the core hours of 10am to 12pm and 2pm to 4pm with the option to come in from 8am and finish up to 6pm. In some of the pilot areas these hours were extended to 7am to 7pm (where appropriate to the service delivery). In other areas the core hours were scrapped completely. As long as the staff teams are able to work out suitable rotas to cover the service standards required then start and finish times can be flexible. Some examples of the working pattern options are:

- flexi-time
- staggered hours
- time off in lieu
- shift swapping
- dispensing with core times
- ability to take hourly leave
- compressed working
- working from home

GROUND RULES AND PRINCIPLES

Team-based approach

Everyone in the team is involved in exploring the flexible work patterns they could work in their area. This means that managers are not responsible for identifying what will be tried and how it will work. Staff should not expect managers to make it work. Remember also that all schemes must be based on a consensus within teams and are operated voluntarily.

There will be very specific rules you will want to apply in particular areas. These will need to reflect the particular concerns and needs of that service, its customers and staff.

Impact on the business

Flexible working is not a right – any new pattern must be assessed for its:

- impact on customers and service users
- impact on the team
- impact on individuals

Joint Responsibility

Managers and their staff must take joint responsibility for making it work. Without everyone's commitment, energy and ideas, the most innovative working patterns will fall by the wayside. Joint responsibility must be taken for:

- finding solutions to business and work-life issues
- problem solving

Mutual flexibility

Give and take between staff and managers and between team members is vital. Not everyone will be able to take advantage of all the options available, all the time.

Differing needs for work life balance

Work Life Balance gives you the chance to broaden the audience for new working patterns. Everyone has different needs. It is likely that a 19 year old will have a different lifestyle and interests to that of a 40 year old.

Being prepared to compromise

Perfect solutions to balancing the needs and desires of employees, matched to the requirements of the business are unlikely. Getting the most of out of Work Life Balance means looking for common ground and best-fit solutions. You may want to work a compressed week with every Friday off, but this may not be fair to your colleagues or your customers. But, being prepared to rotate your day off over a four or five week pattern could work.

GENERAL

The option to take part in a flexible working arrangement does not form part of any permanent change to the individual's contract of employment. Any member of staff who takes advantage of the flexibility must have regular communication with their line manager to discuss whether the working agreement continues to be an effective solution.

Some changes to work patterns will mean that the holiday and bank holiday allowances, time off in lieu and any overtime situations will need to be recalculated or reviewed.

These guidelines do **not** cover:

1. Any permanent changes to working hours e.g. changing to contractual part-time hours from full time, or vice versa.
2. Flexible Working Procedural Requirements Regulations 2002 – these are statutory regulations that affect parents or guardians of children under the age of 6 or under the age of 18 in the case of a disabled child

For further advice on the above, please discuss with your HR adviser

Please note that the working time regulations must be adhered to in any changes to work patterns. These are unlikely to restrict most proposals for variation in work patterns – please consult your HR department if you need further advice

MERTON COUNCIL VISION AND OBJECTIVES

It is vital that the objectives of the Council are considered when looking at the option of Work Life Balance. At the top level we have six strategic objectives. A corporate business plan is created from these objectives and subsequently team and service plans, right down to individual/team appraisals. Individual or team appraisals should accurately mirror the direction the organization is moving in. In other words, every employee should be working towards common goals in order to effectively serve the community. The six objectives are shown below:

"Merton a great place to live, work and learn"

STRATEGIC OBJECTIVES

Education Merton

The achievement of standards of excellence in our schools and colleges and inclusive access to learning, the arts and sport.

Safe, Clean and Green Merton

A safe and clean environment in our streets and open spaces to improve sustainability and provide a high quality of life for residents.

Caring Merton

Support for vulnerable children that provides positive life chances and support for vulnerable adults that meets their needs while maximising their independence.

A Thriving Merton

Regeneration of town centres and neighbourhoods to provide an attractive environment in which to live, visit and work.

Equalities Merton

Full and equal access to learning, employment, services and cultural life and the celebration of diversity

Effective Merton

Strong corporate governance to deliver and sustain service improvements, and provide community leadership

In respect of Work Life Balance you will need to ensure that any organizational needs and service delivery requirements are fully considered when putting together a proposal. Bear in mind that these needs may change and it may be necessary to amend the approach or even to go back to the original working pattern if the service and performance objectives of the department/section/division require it.

"Our ambition is to become an excellent Council by 2006 through delivering high quality services for our residents and customers." Cllr Andrew Judge, Leader of the Council.

The London Borough of Merton has a clear improvement plan for the next three years. This plan builds on the 2003 Best Value Performance Plan and will direct and oversee work until 2006. It confirms strategic objectives and priorities for the next three years. Understanding what is required of you as an individual at work and how your objectives feed into the plans and aims of the Council can help you determine how Work Life Balance might be suitable for you. Think about you can best achieve your objectives whilst effecting a good Work Life Balance solution.

If you need to know more about the 'Merton – The Next Three Years' and our corporate objectives then visit: <http://intranet01/lbmintranet/excellence/> and/or speak with your line manager.

ORGANISATION AND SERVICE DELIVERY REQUIREMENTS

Work Life Balance is a powerful concept and must be *owned by the whole organization*. It gives workers more options and control over their working time and, properly implemented, allows them to support the organization in delivering their objectives efficiently in an employee-friendly way.

Work Life Balance offers workers an opportunity to review they way they work in delivering the organizational objectives. Not all schemes will be workable in all areas but an open mind will be kept when any requests are considered.

Work Life Balance can offer a more fluid and flexible environment in which to carry out the week's work.

Work Life Balance should only be implemented when there are clear benefits for both the organization and the employees who are taking part. Employees should take a proactive and open approach to discussing whether or not a different way of working will benefit all concerned and, as such, it is vital to remember that ownership of Work Life Balance is held by each and every member of staff. The main goal is to establish a new way of working without compromising the desired objectives of that particular team and therefore the organisation.

Organizational needs and service delivery requirements can change and it may be necessary to alter the approach or go back to the original working pattern if the exigencies of the service require.

OUR WORK LIFE BALANCE SCHEMES

PLEASE NOTE THAT IMPLEMENTATION OF ANY OF THE SCHEMES MENTIONED BELOW WILL BE DEPENDENT ON THEIR SUITABILITY WITHIN A PARTICULAR SERVICE.

1. FLEXIBLE WORKING HOURS

You can agree temporary variations to the normal working practice which supports individuals in their outside interests and commitments.

It is essential to be clear about what parts of the scheme are being varied and for how long. If the arrangement is to terminate earlier than expected it is important to agree a period of notice

2. JOB SHARE

All posts are normally eligible for job sharing unless exempt in line with Council criteria. Further details of this are available via HR or on the Human Resources [intranet](#) site

3. HOURLY LEAVE

This would involve the ability to take leave for a specified period of time. For example, taking 2 hours for a private appointment and then ensuring that this time is made up as appropriate.

4. HOURS OF WORK (Flexi-time)

This approach allows employees to work flexible hours that are not fixed to a traditional 9 to 5 pattern. As long as the employee is available for work during the core hours of 10am to midday and 2pm to 4pm, they can make up their remaining hours within the period of 8am through to 6pm (7am to 7pm in some departments) over a four week accounting period.

5. CAREER BREAK

This allows employees to take a break in their career for up to 3 years. For example, to take care of their family or undertake a course of

study. (The break is unpaid and the employee must have been employed for at least five continuous years with the Council, have no current disciplinary record and may only be granted one career break during their employment with the Council).

FOR MORE DETAILS ON THE ABOVE SCHEMES PLEASE TALK TO YOUR HR TEAM OR LOOK ON THE HR INTRANET AT:

<http://intranet01/lbmintranet/hr/policy/>

CONSIDERATIONS AND RECOMMENDATIONS

The following questions and information are designed to help decide if Work Life Balance will work well in your department.

You may also find it particularly useful to review the 'Changing Patterns of Work' publication from the ACAS website:

<http://www.acas.org.uk/publications/B09.html>

Considerations

1. Does the department/section/division have a clear set of objectives or targets which form part of the organisational objectives?
2. Do all employees have clear objectives and understand their deliverables and working context (what does the department/section/division do?)
3. Organizational objectives, changing service delivery requirements and other initiatives such as learning and development activities must take priority over Work Life Balance
4. Any outstanding developmental/training needs of individuals will need to be considered and discussed with their line manager when applying for a work life balance option.
5. Is the department/section/division customer-facing? What hours does it need to be staffed to offer effective support? Seasonal variations should also be considered.
6. Describe the key tasks/responsibilities in the roles under consideration? E.g. arranging meetings, project work, telephone work, supervising etc

7. Describe the working environment and the challenges that altering the working day might pose?
8. How do you propose to alter hours of the department/section/division?
9. Can the department/section/division be flexible about which day/s off will be taken or the change in working arrangements proposed? Are there any circumstances which make it difficult to be flexible e.g. regular meetings, regular class to attend
10. In some situations the holiday and bank holiday allowances, time off in lieu and any overtime situations will need to be recalculated or reviewed
11. Ask how Work Life Balance can support the requirements of the services being provided and the effect on other members of the team
12. What might you need to take into consideration to implement a challenging option? E.g. Changes to start and finish times to ensure end-users/customers are adequately serviced.
13. Also remember to take into account any Health and Safety considerations such as insurance cover and security. This will be particularly relevant if working from home or working any unusual hours in Council buildings. Check with the Health and Safety and security if you have any questions.
14. The success of Work Life Balance in your department/section/division depends on promoting an open and supportive culture and ensuring that everyone understands their responsibilities both on an individual and collective basis for achieving the goals of the department and the organization as a whole.

Recommendations

- 15.No one individual should have preference over anyone else. All team members should be given equal consideration. In addition, there should be no instances where individuals feel 'compelled' to take part in new working patterns.
- 16.Some teams produce a set of 'principles' or an 'agreement' which incorporates the manner in which the team has agreed on their approach to any new ways of working. This could include items such as: agreed level of cover in the office, home contact phone numbers, planned work patterns, timesheets, what level of debit or credit hours can be accrued each month and so on.
- 17.Teams will need to have agreed that 'work on demand' will take precedent over any new work patterns. This will mean that if a large amount of work comes in or there is an urgent project then that must be dealt with as a priority over any new flexible work patterns.
- 18.Draw up new working pattern options. Decide how to record the new patterns and how they will be monitored on an ongoing basis
- 19.Remember to take into account that it might not be possible to make the desired changes and think about how you will deal with that
- 20.All Merton employees should have an appraisal, regular supervision and a clear set of work objectives to be delivered that fit into the wider context of the organizational objectives and direction
- 21.Once any proposed changes have been confirmed the line manager must write to the employee to document the agreement. This letter will outline what has been agreed and set down the review periods that will be in place and a copy will be kept on the employee's personal file. Departmental HR will give advice as to how to structure this letter

22. Line managers must ensure they liaise regularly with any members of staff who are engaged in a work life balance agreement. It would be expected that this would be built into existing supervisory meetings, i.e. review the arrangement, check to see if it is working, review any issues which need to be dealt with. If necessary a revised letter will be issued reflecting what has changed to supersede the previous arrangements

23. Any changes will be valid for a trial period of 3 months after which time it is proposed that reviews take place on a quarterly basis (or similar) as appropriate.

24. **Remember, the option to take part in a flexible approach to working does not form part of any permanent change to terms and conditions of employment.** These arrangements are made as a time-limited variation to a contract. For example, if following a course of study.

Some flexible options will work more easily for some roles than others; this will be largely down to the type of tasks involved and the nature of your working environment. This does not mean that some options will not be considered for some colleagues, it simply means that there might be more challenges that need to be overcome before a particular option can be implemented.

USEFUL WEBSITES

1. <http://www.employersforwork-lifebalance.org.uk/index.htm>
2. <http://www.dti.gov.uk/work-lifebalance/>
3. <http://www.workingbalance.co.uk/events/>
4. <http://www.acas.org.uk/publications/B09.html>
5. www.org.uk

CONTACT DETAILS OF DEPTS IN INITIAL PILOTS

The following departments and individuals took part in the Work Life Balance pilots and will be happy to answer any questions you may have:

- Housing Lettings -Steve Langley
- Local Taxation - David Keppler
- Benefits - Angela Gillard
- Audit, including - Chris Johnson
- Internal Audit
- Service Review
- Anti Fraud
- Youth Offending Team - Rob Moran
- Parking - Paul Walshe
- Community Services, including - Robert Hobbs
- Morden Library
- Plans and Projects – Ged Lawrenson

APPENDIX ONE – CONFIRMATION LETTER TO EMPLOYEE

Dear

Following on from your application for a Work Life Balance option **OPTION 1**: I am pleased to confirm that the following has been agreed.

XX

These changes will operate for an initial trial period of up to 3 months. Subsequently the situation will normally be reviewed on a quarterly basis.

It is expected that review discussions will be built into existing supervisory meetings. The purpose of these discussion will be to review the arrangement and:

- check to see if it is still applicable to the deliverables of the job and is continuing to enhancing service delivery.
- review any issues that have to be dealt with

If necessary a revised letter will be issued reflecting any changes either amending the work pattern/arrangement or terminating it.

You are reminded that the option to take part in a flexible approach to working does not form part of any permanent change to terms and conditions of employment.

I confirm that I understand any impacts that new working patterns might have on: annual leave, bank holiday entitlement, time off in lieu and overtime payments (if applicable in my division).

OPTION 2: I regret to inform you that on this occasion your request cannot be agreed. This is due to xx

A copy of this letter will be kept on your personal file.

Yours sincerely

Name of Manager
Department

Copies: Original to employee and one copy to be held on personal file