

Work-life Balance

Making it work for your business



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Work-life balance is a phrase that increasingly crops up in management journals, in surveys of what people are looking for from their paid work and in casual conversations. Talking about it is one thing. Implementation is another. This guide will take you through the practical steps of making work-life balance a reality within your organisation. Templates and examples for the five steps can be found at the rear of this folder.

The information is an update on what has been learnt from earlier projects and publications,¹ together with the experience of participants in the 2005/06 work-life balance project run by the Department of Labour. As part of this project, the participating organisations agreed to explore work-life balance issues relevant to their organisation, and to develop and implement strategies that suited their particular situation.

We would like to thank the following organisations for sharing what they learnt. EziBuy Ltd, IndeServe Ltd, Education Review Office, Tip Top Bread Auckland, Christchurch Casinos Ltd, City Care Ltd, Kirkcaldie and Stains Ltd, Ministry of Agriculture and Forestry, Hutt Valley District Health Board, Office of the Commissioner of New Zealand Police, Fulton Hogan Ltd, Compac Sorting Equipment Ltd, Express Couriers Ltd.

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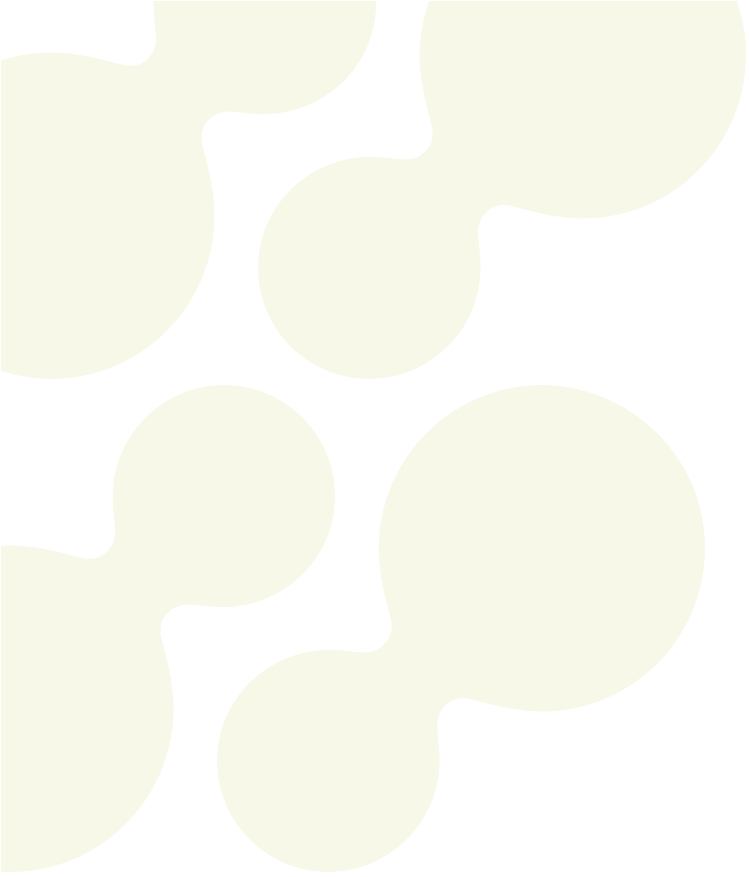


For more information, additional work-life balance tools or other workplace related matters visit
<http://www.dol.govt.nz/worklife/>

The content of this document is a guide only. It will not answer every question and should not be used as a substitute for legislation or legal advice. The Department of Labour takes no responsibility for the results of any actions taken on the basis of information in this booklet, or for any errors or omissions.

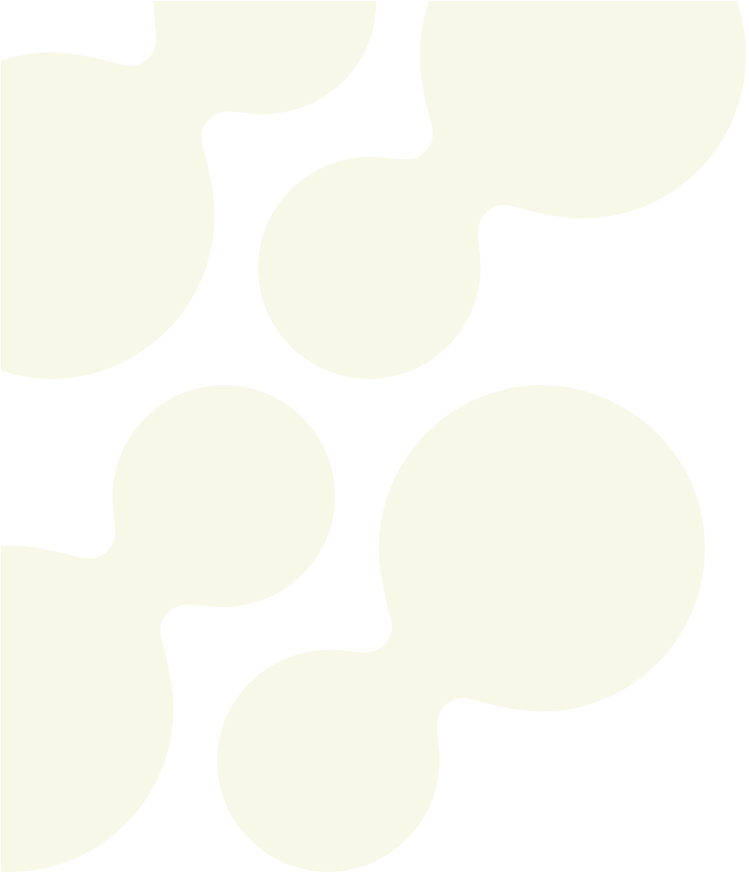
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1. This publication is based on, and updates *Work & Family: Steps to Success*, written by Top Drawer Consultants and Families At Work, published by the EEO Trust in 1996.



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Who is this publication for?

Although it is principally written with large and medium-sized organisations in mind, even small organisations will find value in stepping back from time to time and reflecting on the issues raised in this resource. Those who may find it particularly helpful include:

- human resource professionals
- managers
- work-life balance committees
- anyone interested in making work-life balance possible for people in their organisation.

What are the issues?

What do we mean by work-life balance?

Work-life balance is about people feeling satisfied with the way they divide their time and energy between paid work and all the other things they need and want to do. It is a critical issue for people:

- with caring responsibilities, including for children, older people and partners with long-term illnesses or disabilities
- with responsibilities in their community, culture or church
- studying
- with health issues or disabilities of their own
- who want to stay fit and healthy
- moving towards retirement
- who are passionate about other interests or sports
- needing to manage the everyday business of life such as getting to the bank or organising a plumber.

The 'right' balance varies. It is different at different stages of our lives. The father who needs to be able to pick his children up from school two days a week when they are young may be happy to work longer hours when they have left home, but may then want blocks of time off to study or travel.

A satisfactory balance is different for different people. A satisfactory work-life balance for most people results from some combination of the following factors:

- the number of hours they have to work
- the level of control or choice they have about when and how they do that work
- the level of satisfaction their work gives them and whether they feel their work is valued.

Some people who work long hours are quite happy with their work-life balance so long as they have some ability to fit their work around the rest of their lives and they feel that their work is worthwhile. Others, who work strictly limited hours, may be frustrated with their work-life balance when their work feels meaningless or they feel powerless.

What are the issues?

Although the issues and the desirable solutions may vary, work-life balance is an issue for employees in all types of work, at all levels of the organisation and in all kinds of organisations. It is as important to the person in the maintenance crew as it is to the senior manager. It is as important to the person in the bakery as it is to the person working for a government department.

For some, work-life balance means that paid employment is now possible, whereas before it was all too difficult. For others, it offers the possibility of combining work with other aspects of their lives, rather than having to choose between them.

What happens at work influences what happens in the rest of our lives. The employee who is tired and stressed from work is less likely to have energy and patience for supporting teenage children. What happens outside of work influences how we perform and feel at work. The employee whose personal relationships have been neglected and broken down is less likely to bring enthusiasm and concentration to their work. Getting a satisfactory work-life balance maximises the positive spill-over between work and the rest of our lives, and minimises the negative spill-over. This is good for employees and employers.

What's it got to do with employers?

Deciding on and maintaining an appropriate balance between our work life and our personal life is an individual responsibility. An employer cannot do it for their employee. However, what happens in the workplace can make this possible or impossible. Unpredictable work demands, rigid start and finish times, and long working hours will make it impossible for many employees to find a satisfactory balance. Employers who are open minded about job design,

flexible in their approach to working arrangements and cognisant of employee needs make that balance possible.

The benefits of addressing work-life balance issues

The benefits for employees are obvious. It opens up a greater range of choices about work and careers; it reduces the need to sacrifice one for the other and increases the chances that people will enjoy and get satisfaction from both. It enables people to have a good quality of life.

Employers have also found distinct benefits in making work-life balance possible for their employees.

Recruitment and retention

A common motivation for organisations is attracting and retaining staff. Employers who can demonstrate that work-life balance is possible for their employees will attract a much wider range of candidates when they are recruiting for new employees, especially in a tight labour market. Organisations that make work-life balance possible are more likely to retain the employees in whom they have already invested and avoid the significant costs associated with replacing them. This is the case for a surprisingly wide range of employees. Kirkcaldie and Stains Ltd, for example, surveyed the students who work in their department store on a part-time basis and found that 84% of them said that the ability to get a satisfactory work-life balance has a lot of influence on whether they would continue to work there.

What are the issues?

Morale and employee relations

For many employers facilitating a satisfactory work-life balance is a critical strategy for improving employee morale and satisfaction. It is integral to any employer-of-choice programme and for developing an effective partnership with unions. Some employers use it to encourage culture change or to ensure they are supporting their employees appropriately. They are using the development of a work-life balance strategy to build trust, and to encourage dialogue and constructive problem-solving.

Flexibility and business needs

There are times when all businesses need flexibility from their employees. It may be to change working hours or shifts to meet changing customer demands. It may be to back up colleagues who are on leave or away on training. It could be to complete an important project with a tight deadline. Employees are much more likely to be willing to meet their employer's needs if the employer has an established track record of being flexible in meeting their needs.

In June 2006 the Department of Labour published Work-Life Balance in New Zealand – a snapshot of employee and employer attitudes and experiences. It summarises the key findings of two national surveys, one of 1100 employers, and the other of 2000 employees. The study showed employees most value flexible start and finish times, and more leave – both paid and unpaid. They also want more choice about the way they work, including having more input into rosters and shifts, and choosing the number of hours they work. Workers understand business imperatives facing their workplaces.

Customer Expectation

Businesses with a strong need for customer service have found that developing a successful work-life balance strategy for employees has enabled them to retain staff who are happy to be at work and more responsive to the needs of their customers. Some employers believe that both customers and colleagues have found these employees more interesting and fun to work with.

In addition employers understand that to keep their business competitive they need to have the right number of staff, in the right place, at the right time, to meet customer demands.

Increased Productivity

A New Zealand study, commissioned by the Equal Employment Opportunities Trust in 2007 concludes:

'organisations which encourage work-life balance in principle and in practice will reap the benefits of increased employee engagement, discretionary effort and therefore productivity. A strategy to encourage work-life balance or a series of work-life initiatives is not sufficient to increase discretionary effort and employee engagement. Work-life balance must be supported and encouraged at all levels of the organisation, including senior management, line managers and all staff.' (Work-life balance, employee engagement and discretionary effort – a review of the evidence. A literature review by Dr Mervyl McPherson of the EEO Trust.)

Steps for developing a work-life balance strategy

Every organisation will find its own way of dealing with work-life balance issues. However, those organisations that respond most successfully to these issues tend to follow a similar path, and to work in partnership with their employees and their representatives. They will typically set up a working group of employee, union and management representatives, to guide them along this path.

Step by step checklists

The following checklists outline the key steps in developing work-life balance practices in a business or organisation. The processes are described in more detail in the following chapters.

Step 1 – Get management support and the right people on board

- Identify the motivation for your organisation to develop a work-life balance strategy.
- Assess whether this is an appropriate time for addressing these issues.
- Elicit support from senior management.
- Consult the relevant unions on the best way to go about developing a strategy.
- Appoint a working group to manage the project.
- Communicate to the entire organisation about the project and what is involved.

Step 2 – Find out about what's happening now, and what the issues are for your organisation and your workforce

- Gather any information – formal and informal – that is currently available on work-life balance issues in your organisation.
- Check which policies, provisions and practices you already have to assist with work-life balance and find out what staff and managers know about them.
- Identify the areas where you already know there are issues, or that you think it would be useful to explore.
- Develop and implement a communications strategy appropriate to the way you plan to assess needs.
- Plan, conduct and analyse an employee needs assessment survey.
- List and prioritise the key work-life balance issues in your organisation.

Steps for developing a work-life balance strategy

Step 3 – Identify the possible solutions

- List the possible solutions.
- Review what other employers are doing.
- Consult relevant managers, staff and unions on the most appropriate solutions for your organisation.
- Assess the relevant options.
- Select the best 'package' of options to make up your strategy.
- Develop an action plan.
- Get sign-off or commitment from key stakeholders.

Step 4 – Implement the strategy

- Develop and implement a communication strategy.
- Implement the initiatives through an action plan.
- Set some measures for your initiatives and a timeframe for reviewing them.

Step 5 – Measuring and maintaining progress

- Monitor and evaluate the initiatives.
- Adjust the initiatives if needed.
- Maintain work-life practices.
- Make it part of the culture of your organisation.

Step 1

Get management support and the right people on board

Involve the relevant unions

Involve the unions who represent your employees early in the process. Employers have found work-life balance projects useful in building workplace partnerships and good relations with unions.

The unions will be important for:

- communicating with, and getting the support of, their members
- identifying potential work-life balance issues in your workplace
- finding out what other employers with similar issues are doing
- assessing the best way of addressing work-life balance issues in your organisation
- helping develop solutions that will work for your organisation.

Set up a working group

Organisations that have a work-life balance strategy have found it useful to appoint a team of people to develop it. A team will:

- bring a range of skills and perspectives to the job
- bring knowledge of different parts of the organisation
- provide greater continuity for what can be a medium or long-term project.

Team members can be drawn from Human Resources staff, management and from different parts of the organisation. It is useful to make sure the group broadly reflects the people employed in your organisation. You may need to think about gender, ethnicity, age and length of experience, and include people with family responsibilities.

The teams that are most successful have:

- a strong mandate from their senior management team
- a project leader with the skills and time to do the job
- a clear brief
- people who are interested in the issue
- a good understanding of their organisation's needs and ways of working
- access to relevant information
- good communication processes.

For information and resources about working in partnership visit: www.dol.govt.nz/services/PartnershipResourceCentre

Avoiding the traps

In developing a strategy, take care to avoid the following traps.

Raising unrealistic expectations

In all communications about developing a work-life balance strategy, take care in managing people's expectations. Be clear that although the organisation wants to know what people's needs are, it will not be able to do everything and, of what it can do, it will not be able to do it all at once. If the nature of the work or organisational constraints means that some things will never be an option, then do not raise them.

Step 1 Get management support and the right people on board

Organisations often fear that employees will have totally unrealistic requests. In fact, employees are generally very realistic about the constraints of their jobs. They understand the need to provide cover and maintain adequate staffing levels. Employees who mainly deal face to face with customers do not ask to work from home.

Something for everyone, not necessarily the same for everyone

In trying to make it easier for staff to achieve a satisfactory work-life balance, it will not be possible to treat everybody the same way. Different jobs, different work pressures and different personal needs mean that there will need to be different solutions. The aim is to do something for everyone, not necessarily to treat people in exactly the same way.

In doing this, take care that you are not focusing on just one or two specific groups. Depending on their job, all people – not just those with young children – need to be able to be considered for quality flexible work arrangements. The work-life balance of managers needs to be considered, as well as that of staff. If both groups have a similar level of need, be careful about focusing on operational staff at the expense of administrative staff.

It has to work for the organisation and the rest of the team, as well as for the individual

Strategies, initiatives and arrangements that do not work for all three will not be sustainable. When you consult people about solutions, when you design initiatives or when you promote strategies, ensure that you are looking at the issue from all three perspectives.

Step 2

Find out about what's happening now, and what the issues are for your organisation and your workforce

Your work-life balance strategy needs to reflect your organisation's particular circumstances and workforce. This section will help you to:

- identify what you need to know to develop your strategy
- decide how to gather the information
- analyse the information.

What is happening now?

Before you can decide what your organisation should do about work-life balance issues, it is useful to consider the following questions.

Your workforce

- What is the gender, ethnic and age composition of your workforce?
- Where do you typically recruit people from?
- What attracts people to work for your organisation?
- How easy is it to recruit?
- How well do you retain employees?
- How does the retention rate compare with the rest of your sector?
- Why do people leave your organisation?
- Do you typically promote people from within or from outside?
- What are the hours that people normally work?
- If your organisation uses shifts or rosters, how well do these work?
- How satisfied are people with their shift or roster patterns?

Possible sources for this information include climate or attitude surveys, exit interviews, organisational research, your human resource information system or personnel records, or any external reporting your organisation is required to do.

Your business

- Are current business demands impacting on your staffing levels, workloads or hours of work?
- Are there any foreseeable business demands that will impact on your staffing levels, workloads or hours of work in the future?

You may be able to find this out from strategic or business plans, or from discussions with managers.

Your organisation's current approach to work-life balance

- What are the key things that are likely to put pressure on work-life balance in this organisation?
- How much attention has this issue been given to date?
- If the issue has already arisen in your organisation, what prompted this?
- What does your organisation already do to assist employees with work-life balance?
 - overt policies
 - hours of work
 - leave provisions
 - job design
 - work planning
 - direct service provision, e.g. school holiday programmes

Step 2

Find out about what's happening now, and what the issues are for your organisation and your workforce

- information provision, e.g. retirement programmes
- culture of the organisation, e.g. social activities.
- Do men and women in senior roles have families?
- Do any people in senior or high-profile roles work other than standard hours?
- Can people progress in the organisation if they work other than standard hours?

Possible sources for this information include policy documents, HR plans, work-life balance research, management team papers and anecdotal knowledge.

Identify where to start your investigations and gather further information

Use the above information to identify the likely work-life balance problems or issues in your organisation. If you have only a fairly general idea of what these might be, there are a number of ways to get a broad picture of what your organisation is already doing to help employees achieve a satisfactory work-life balance, what makes it harder, and what else would make a difference.

To find out more about issues for your employees, you can:

- run a staff-wide work-life balance survey
- interview a sample of individual employees
- run focus groups with some staff
- run more detailed questionnaires to all or a sample of staff
- various combinations of the above.

As well as asking employees what work-life balance solutions they think would work, it is also useful to ask managers about what solutions they think are practical.

Consultation processes can be conducted by internal staff or external consultants.

Some organisations have found that a work-life balance survey is often useful for raising awareness of the issues, prompting discussion, and sometimes even encouraging people to start problem-solving about their immediate issues. They are limited, however, in providing explanations or developing detailed solutions. A survey that can be adapted to your organisation's needs can be found in this folder and is available on the internet at www.dol.govt.nz/worklife. Use the survey results to prioritise where you need further information. You can use interviews, focus groups or smaller samples to find out more about particular issues.

How you choose to gather the information will depend on:

- what information techniques your organisation is familiar with
- how the people in your organisation feel comfortable operating
- whether written English will be understood by all staff
- the level of trust in the organisation as to how the information will be used
- the time, expertise and resources you can commit to the project.

Step 3

Identify the possible solutions

Work-life balance issues vary from organisation to organisation. It depends on the nature of the business, the size, style and culture of the organisation, the characteristics of the workforce, the geographical location and the history of the organisation. The solutions are just as varied. Listed below are some identified work-life balance issues and ideas for solutions

Communication

What's the issue?

One of the most common work-life balance issues is that employees and managers do not know what is already available and/or working in the organisation. Problems include:

- people are not aware of existing policies
- people are not aware of practices that are already working successfully in other parts of the organisation
- employees do not know that they can ask about alternative working arrangements or specific provisions
- new employees have not been told about available options
- the length of time since employees were told about work-life balance policies at their induction.

What might you do?

There are two levels of communication that are typically needed – a base-level awareness and knowledge that all employees require, and access to more detailed information when and if employees need it, e.g. when going on parental leave.

Strategies being used by organisations to address this include:

- enhanced induction programmes for employees and new managers
- using newsletters, pamphlets, posters and intranet to give people overview information and detailed information on specific issues (these resources need to be kept up to date)
- discussion prompts that teams are asked to talk about, and respond to, on a regular basis
- equipping employee advisors and/or union delegates to assist people with queries related to work-life balance issues.

The need for flexibility

What's the issue?

Flexibility in work arrangements and working hours typically heads the list of things people identify as helping them achieve a satisfactory work-life balance. Useful arrangements include:

- flexible start and finish times
- employees choosing their own working hours
- employees choosing their own lunch times
- being able to attend to family matters or personal business on occasion during normal working hours
- being able to leave work for family emergencies
- working from home
- taking time-in-lieu for working additional hours.

Step 3

Identify the possible solutions

Difficulties with flexibility include:

- employees and managers being unsure about their organisation's attitude to flexible work arrangements
- different approaches taken by different managers, even when work requirements are similar
- access to flexibility being available on a grace-and-favour basis, and hence causing resentment
- managers not being equipped to manage flexible working arrangements
- organisations relying on traditional arrangements, and hence not looking for constructive solutions
- employees thinking only about their own needs, and not recognising that flexible work arrangements have to work for the organisation and the rest of their team as well as for them.

What might you do?

Solutions typically include some combination of:

- formal policies
- guidelines and training on managing flexible work arrangements
- encouraging and equipping employees and managers to take a problem-solving approach to considering flexible working arrangements, and to apply good-faith principles to considering flexibility requests
- providing structured opportunities for managers to exchange ideas and experiences of successful flexible working arrangements
- getting teams to develop their own agreed protocols about flexible working arrangements to ensure sufficient cover and back-up

- developing protocols and providing equipment for people to work from home on either a casual or regular basis.

Hours of work, including shifts and rosters

What's the issue?

Work that requires cover for specific hours, including shifts and rosters, is often one of the most difficult work environments for people wanting a satisfactory work-life balance. Key difficulties can include:

- lack of predictability
- lack of flexibility to meet individual needs, either short term or long term
- getting stuck on a shift or roster, e.g. night shift, that does not work well for the individual
- start and finish times that make caring for children, or getting to and from work, difficult
- too many changes so that people are not able to adjust their sleeping patterns effectively.

These difficulties particularly impact on:

- people's ability to spend time with family
- relationships
- social lives
- fatigue levels
- overall health
- the ability to maintain fitness.

Step 3

Identify the possible solutions

What might you do?

It is unlikely that these difficulties can be eliminated. However, some organisations have found useful ways of minimising them. These include:

- staggered start and finish times so people can select those that best fit with their personal circumstances
- working with teams to find the roster or shift pattern that best fits the needs of the business and employees
- developing a pool of trained casuals who can fill in on a regular basis
- developing protocols for people to swap shifts or rosters, or even parts of a shift, to enable employees to attend a regular commitment
- researching and following best-practice principles in designing shifts and rosters
- making greater use of part-time staff to cover unpopular shifts
- putting in place a process for people to indicate shift or roster preferences
- negotiating a framework or process for requesting flexibility within any collective employment agreement.

Job design

What's the issue?

It is easy for organisations and employees to assume that the traditional pattern of full-time work within conventional working hours is the way that jobs will always be designed. This approach, however, works well only for some businesses and some employees. For some businesses it can cause difficulties by:

- restricting the pool of people to recruit from
- making it harder to retain valuable staff when their personal circumstances change

- making it harder to meet the needs and expectations of customers
- creating bottlenecks in work flows, and under-utilising equipment and plant.

For some employees it can cause difficulties in:

- having sufficient time and energy for other responsibilities
- hours of work not fitting well with other commitments or their personal energy levels
- raising stress levels as they try to juggle more than they can comfortably manage.

Even when organisations are open to using arrangements such as part-time work or job-sharing, they may still try to put it into a full-time work mould. Meetings will be scheduled at times when part-time employees are not working. Hours of work and remuneration may be decreased while the workload is not. There may be no flexibility for moving between full-time and part-time work as circumstances change. Sometimes it might be wrongly assumed that people who choose to work other than the conventional arrangements, may not be serious about their career.

What might you do?

Organisations that want to address this issue are becoming much more open to arrangements such as part-time work, job-sharing, compressed working weeks, variable hours at different times of the year, or even part-year work for employees, at all levels and all areas of the organisation. They are also becoming a great deal more considered in their assessment of the suitability of these arrangements and what they can do to make them work. They are using strategies such as:

- developing protocols for moving between full-time and part-time work

Step 3 Identify the possible solutions

- allowing managers to job-share
- ensuring that meetings, training and social events consider the needs of part-time employees as well as full-time employees
- varying the times of meetings so that everyone can attend some of the time
- making sure that those who cannot attend are briefed about the meeting
- monitoring work demands more carefully so they can predict staffing needs more accurately.

The way work is organised and managed

What's the issue?

The way that work is organised and managed can lead to frustration and unnecessarily long or unpredictable hours that impact negatively on people's work-life balance. Typically this may be a result of:

- inadequate or poorly maintained equipment that makes the job harder
- poor planning, which leads to unnecessary work peaks
- poor planning or resourcing of expected and necessary work peaks
- inappropriate deadlines and scheduling
- inadequate systems and documentation that leads to unnecessary confusion or duplication
- inefficient reporting which wastes time and adds little value.

In some organisations, addressing these issues is the most direct way of improving people's ability to achieve a satisfactory work-life balance.

What might you do?

Some of these issues need to be tackled at an organisational level, e.g. initiatives to streamline planning and reporting or to reduce paperwork and emails. Other issues need to be addressed at a 'local' level where teams are encouraged to find ways of working smarter to save themselves time and enhance work satisfaction.

In some cases it is about helping employees in different work areas understand each other's work and the pressures they face, so that they do not inadvertently make each other's work more difficult.

Workloads

What's the issue?

High workloads, leading to long hours of work on a regular basis, can make getting a satisfactory work-life balance more difficult. This can have a number of causes, including:

- insufficient staff
- high turnover of staff
- delays in filling vacancies
- poorly designed shifts or rosters, so although there are periods of understaffing there are other periods when too many staff are rostered
- inadequate training
- poorly distributed work
- poorly designed jobs
- not addressing the poor performance of some team members.

This typically leads to:

- high stress levels and burnout

Step 3 Identify the possible solutions

- people having difficulty getting home on time
- people feeling that their work is not being valued.

What might you do?

Addressing these issues can have a significant impact on employees' work-life balance. To address this you will need to:

- identify the scope of the issue in your organisation, e.g. is it across the whole organisation or just parts; is it across the whole team or just in specific roles; is it all of the time or just at specific times of the year? (Staff in one unit of an organisation kept a work diary for a month to better understand the nature of the problem.)
 - identify the cause
 - analyse what is within the organisation's influence or control, and what is not
 - identify and trial relevant solutions.
- managers who have been appointed for their technical skills and who are lacking in people management skills
 - managers not knowing about existing policies or provisions
 - a high turnover of people in supervisory and management roles, and hence a large number of inexperienced managers or people only acting in the role
 - managers without the skills and confidence to address these issues
 - managers who personally have a poor work-life balance.

What might you do?

Organisations which have addressed this issue have typically put together some combination of the following:

- adjusting role definitions and the recruitment and selection processes for appointing managers and supervisors to ensure that they appoint people with people management skills
- giving managers and supervisors a clear mandate to be proactive in addressing this issue through formal policy statements and/or clear direction from the chief executive
- ensuring that induction training for new managers and supervisors addresses this issue
- running forums for managers to exchange ideas and experiences in addressing work-life balance issues with their staff
- developing case studies or profiles of successful initiatives or approaches to work-life balance issues that are already occurring in the organisation

Skills and confidence of managers

What's the issue?

Many organisations have found that the more comfortable employees are with talking to their manager or supervisor about work-life balance issues, the more likely they are to be satisfied with their work-life balance. The approachability, skills and confidence of managers in understanding and responding appropriately to work-life balance issues is critical. Typical difficulties include:

- managers not being clear on the organisation's approach to work-life balance, and hence not being sure about how proactive they should or could be

Step 3

Identify the possible solutions

- including managers' success in facilitating work-life balance in their performance management
- providing managers with the tools, e.g. specific policies, guidelines and resources, to address the work-life balance issues they are likely to encounter
- ensuring that general leadership training encompasses work-life balance issues
- monitoring and, where necessary, addressing the work-life balance of managers.

Leave

What's the issue?

Leave typically comes up as an issue when organisations examine work-life balance.

This includes:

- when leave can be taken
- difficulties in scheduling leave
- whether there is sufficient cover available while people are on leave
- how much notice is given that leave has been granted
- leave that is withdrawn
- how competing demands for leave are dealt with
- how much leave is available, and is it possible for people to negotiate or buy additional leave
- people not knowing or understanding arrangements related to taking leave or time-in-lieu
- real or perceived unfairness about leave provisions.

What might you do?

A range of strategies can address this issue, including:

- developing clear and transparent principles for approving leave
- streamlining the processes for applying for leave
- prompting employees to apply for leave early, reminding them to think about family, religious or cultural commitments that they may need leave for
- working with employees to identify the times when work demands require that leave will be granted only in emergencies
- developing protocols for negotiating or buying additional leave
- developing a trained pool of casuals or relievers to provide cover while people are on leave
- improving systems and documentation so that people can provide adequate cover while people are on leave.

Support for caring responsibilities

What's the issue?

Some of the things that people are looking for in their work-life balance, such as time for travel or sport, are optional. Caring responsibilities generally are not. For this reason, many organisations pay particular attention to making it possible for people to balance work and caring responsibilities.

Common issues include:

- managing parental leave
- supporting people with partners, parents or children with significant illnesses or disabilities
- caring for children before and after school, and in school holidays

Step 3 Identify the possible solutions

- caring for children when they are sick
- participating in important events in children's lives
- expectations of extended family in some cultural groups
- coping with bereavements.

What might you do?

Many of the solutions discussed in earlier sections will help support people with caring responsibilities. In addition, some organisations also:

- provide or facilitate access to childcare and school holiday programmes
- provide information or seminars on relevant issues such as community services for older people
- put in place processes to ease and manage the transition to and from parental leave, including keeping in touch with people while they are on leave
- run initiatives such as family days, or design social events that specifically include family members
- ensure that facilities provided for employees such as Employee Assistance Programmes or access to medical care, are extended to family members as well.

Workplace Culture

What's the issue?

One of the things that has the most impact on people's ability to get a satisfactory work-life balance is also the most subtle. Does the organisation's culture facilitate or inhibit work-life balance? This is typically related to:

- the approach of leaders in the organisation to work-life balance. Do they support it? Do they role model it?
- whether people who are seeking work-life balance can be successful in the organisation. Are they marginalised or not seen as serious about their careers? Are there people in senior roles who make and protect time with their families?
- how effective team work is in the organisation. Effective teams provide each other with the support, cover and back-up to make work-life balance possible.
- does your organisation encourage a 'hero' mentality, where people working very long hours at short notice are the people who are valued, rather than those who work smart and achieve the same results?

What might you do?

Chief executives and organisations wanting to ensure their culture facilitates work-life balance have:

- facilitated open and frank discussions about work-life balance among their senior management team
- made sure that reference to work-life balance is made regularly during presentations and discussions by the chief executive and other senior managers
- actively encouraged team work by researching and promoting what makes for good teams in their context, providing the resources, time and incentives to encourage team work and intervening quickly if and when problems arise

Step 3 Identify the possible solutions

- acknowledged and celebrated the achievements of employees outside the workplace
- acknowledged and celebrated employees who work smart, not just long.

Selecting the right options for your organisation

Effective work-life balance strategies are a combination of initiatives tailored to the organisation's needs. These initiatives should complement and reinforce each other.

Be wary of a piecemeal approach. Employees in large organisations will rapidly become cynical about one-off initiatives that are geared to the needs of only a handful of staff. However, if it is obvious that this is a first step, or part of wider strategy, it will have a much more positive and widespread impact.

Carefully consider the implications of any initiatives you select. The option needs to be right for those using it, and it also has to work for their colleagues and the organisation as a whole.

For example, working from home is a useful option for many organisations. But for the individual, working from home must be appropriate to:

- the type of work they do
- their personal style of working
- their home environment.

Colleagues with a team member working from home must still be able to:

- access shared equipment, information and resources
- have ongoing communication
- enjoy an equitable spread of the workload.

Organisations with staff working from home need to ensure:

- adequate coverage of the work
- minimal disruption to clients
- adequate security of information and equipment
- effective ways of managing and measuring performance
- good two-way communication with the staff
- workplace health and safety requirements are met.

Solutions can be found for most problems, particularly if they are anticipated and addressed when the policy is being designed. If they can't be solved, the particular option may not be appropriate for your organisation.

Selecting the order

When deciding the order in which to implement your options, consider:

- visibility – do you need to establish a profile for work-life balance issues in your organisation?
- urgency – do you have a pressing issue or problem that needs quick resolution?
- easy successes – do you need early successes to show what is possible and to build confidence?
- available resources – if resources are limited, you may need to start with the least resource-intensive initiatives first
- building the skills – if this is new territory, start with the simple, more conservative options
- available enthusiasm – if an area of your organisation is keen to take the lead, you may want to start by addressing their particular issues.

Step 4

Implement the strategy

Not only does the content of a work-life balance strategy need to be tailored to your organisation, but the way you implement that strategy will need to be custom made as well. This section focuses on:

- knowing your own organisation
- whether to have formal policies or rely on informal practices
- marketing your work-life balance strategy.

Know your organisation

Useful questions to consider include whether your organisation:

- works best with a centralised or decentralised approach
- likes to be a leader or innovator, or is more cautious, preferring to follow the leaders
- responds best to policies and guidelines, or needs motivational leadership
- looks inside or outside the organisation for best practice
- has one predominant culture, or has different parts with quite different cultures which will require further tailoring of your strategy.

One useful way of answering these questions is to identify other successful changes in your organisation and ask:

- Why was the change process successful?
- Are there any lessons from this for your work-life balance strategy?

Formal or informal?

A question debated by many organisations addressing work-life balance issues is whether it is better to have formal policies or to encourage informal practices.

The advantages of informal practices are:

- they don't have to wait for the development of policies and guidelines
- they give innovative managers more scope
- managers don't feel hemmed in by rules and regulations.

Advantages of formal policies are:

- they don't just rely on the skill and good will of managers
- they give managers explicit permission and direction to address the issues
- they ensure more consistent access for employees
- employees know what to expect and are less likely to perceive individuals getting preferential treatment.

The right answer for your organisation will depend on its size, style and culture. The approach taken to work-life balance issues must fit with how you treat other management issues. What is the same for every organisation, however, is that you cannot have rules for every situation. Instead, organisations need to:

- send a clear and consistent message about how it wants these issues to be treated
- give managers a framework for making decisions

Step 4 Implement the strategy

- reward those managers who do it well
- give staff some recourse if they believe their needs are not being fairly considered.

Work-life balance arrangements can be included as part of the provisions in individual or collective employment agreements, and may reflect the way in which hours are scheduled and organised in practice, the need for healthy and safe hours to be worked, and the ability to combine work with private life. This can be as a result of two-way communication, staff consultation and collective bargaining to create meaningful work-life balance opportunities.

Marketing your work-life balance strategy

To effectively market your work-life balance strategy you will need to identify:

- the different audiences in your organisation
- their concerns
- what would convince them
- what strategies to use to gain their support.

The following chart outlines some of the things organisations have found when they have done this identification exercise.

Senior Management Team/Board

Possible concerns	What would convince them?	Strategies to gain support and ownership
<ul style="list-style-type: none"> • Does our organisation need this? • How will this help our business? • What are others doing? • What will it cost (time and money)? • Will this fit with our culture? 	<ul style="list-style-type: none"> • Evidence that staff need and want this • Research or examples that demonstrate it is worth doing • Careful and accurate assessment of costs and benefits of the options • Practical implementation strategies 	<ul style="list-style-type: none"> • Find a champion • Tie it to business objectives • Compare with competitors • Present business cases professionally

Step 4 Implement the strategy

Managers/Supervisors

Possible concerns	What would convince them?	Strategies to gain support and ownership
<ul style="list-style-type: none"> • Why is our organisation doing this? • Is our organisation serious about this or is it just talk? • How will it help me do my job? • What will I have to do? 	<ul style="list-style-type: none"> • Evidence of how this will benefit the organisation • Demonstrated commitment of senior managers • Concrete examples of what this means for me • Practical advice and ideas 	<ul style="list-style-type: none"> • Consultation • Presentations by senior champion • Representation in the working group • Practical guidelines and tools • Information, support and training • Positive rewards and recognition

Employees

Possible concerns	What would convince them?	Strategies to gain support and ownership
<ul style="list-style-type: none"> • Why is the organisation doing this? • The words are fine, but what will it mean in practice? • How will this help me • Will I get penalised if I use this? 	<ul style="list-style-type: none"> • Evidence of how this will benefit the organisation and me • An ongoing commitment so that even if I don't have any issues now, it will still be available if my circumstances change • A range of options so that my needs are met • Recognition of the impact of these policies and practices on all employees, not just on those using them • Demonstrated commitment of my manager 	<ul style="list-style-type: none"> • Representation in the working group • Consultation about needs • Consultation about possible solutions • Clear policy statement • Real action • Visible successes • Staff recourse if managers are not fairly considering their needs

Step 5

Measuring and maintaining progress

The real test of any work-life balance strategy is not how many initiatives are introduced, but how many actually make a difference and are still effective three or four years on. This section focuses on how to:

- measure progress
- maintain the momentum of your work-life balance strategy
- ensure that sensitivity to work-life balance is part of your organisation's culture.

Measuring progress

Measuring the impact of your work-life balance policies and practices will help you to:

- identify what is working, what needs modifying or where an alternative approach might be needed
- prioritise initiatives
- target limited resources to where they will be most effective
- convince managers and employees of the value of the organisation's work-life balance strategy.

In some cases, such as the return from parental leave, you will be able to measure the impact directly. Other measures, such as the influence on staff morale, will be more indirect, especially when the work-life balance strategy may be only one of several influences.

The following table lists a range of possible measures. Pick only what is relevant to your organisation and to what you are trying to achieve. Keep it simple. Wherever possible, adapt ways your organisation already collects other information, rather than setting up new collection methods. For example, if you regularly ask staff for information in climate or staff opinion surveys, include questions on work-life balance.

Step 5

Measuring and maintaining progress

What to measure	How to measure
Recruitment	
<ul style="list-style-type: none"> • Is it getting easier to attract a wide range of quality candidates? • Is the organisation's approach to work-life balance impacting on why people apply? 	<ul style="list-style-type: none"> • Tracking success in filling vacancies • Surveying applicants • Asking recent appointments during the induction process what attracted them to the position
Retention	
<ul style="list-style-type: none"> • Is dissatisfaction with work-life balance a factor in why people leave? • Does the organisation's approach to work-life balance have any impact on why people stay? 	<ul style="list-style-type: none"> • Changes in retention patterns • Exit interviews • Attitude or climate surveys • Requests for changes in work arrangements, e.g. shifting between full-time and part-time work
Morale, loyalty, commitment	
<ul style="list-style-type: none"> • Does the organisation's commitment to work-life balance influence how employees view their employer? • Do the organisation's work-life balance policies and practices influence how employees view their work? 	<ul style="list-style-type: none"> • Attitude or climate surveys • Participating in external benchmarking surveys • Checking in performance management discussions • Productivity and performance records • Anecdotal evidence • Focus groups
Absenteeism	
<ul style="list-style-type: none"> • Are there any changes in overall absenteeism levels? • Has absenteeism been related to specific times of the year or events? Is this changing? 	<ul style="list-style-type: none"> • HR information system • Anecdotal information
Return from parental leave	
<ul style="list-style-type: none"> • What is the return rate from parental leave? • Do people return on a full-time or part-time basis? • What is the length of parental leave? • Are people using parental leave instead of resigning? 	<ul style="list-style-type: none"> • HR information system • Exit interviews
Return to employment in the organisation	
<ul style="list-style-type: none"> • Are people choosing to return to employment in the organisation? • Why are they choosing to return? 	<ul style="list-style-type: none"> • HR information system • Selection interviews

Step 5

Measuring and maintaining progress

What to measure	How to measure
Impact of particular programmes or practices	
<ul style="list-style-type: none"> • Take-up of specific practices or enrolment in specific programmes • Ongoing use of the practice or programme • Whether the programme or practice is having the desired impact 	<ul style="list-style-type: none"> • Enrolments • Evaluation forms • Interviews with participants, managers and colleagues • Staff surveys • Productivity and performance records
Organisational flexibility	
<ul style="list-style-type: none"> • Matching of the organisation's need for flexibility with that of employees 	<ul style="list-style-type: none"> • Level of employee response to redesigned work hours • Absenteeism levels • Use of casual or temporary staff • Time and difficulty in filling rosters or shifts • Number of applicants for other than standard positions • Staff surveys • Anecdotal
Public profile	
<ul style="list-style-type: none"> • Do customers perceive the organisation as a good employer? • Does the community perceive the organisation as a good employer? 	<ul style="list-style-type: none"> • Participation in external benchmarking surveys • Number of positive media or external references (e.g. conferences, research) to the organisation's approach to work-life balance • Customer satisfaction surveys

Step 5 Measuring and maintaining progress

Maintaining progress

Keep on communicating

Communicating once is not enough. Communicating in one way is not enough. A regular, drip-fed approach with a range of audiences is best.

For example, one organisation that wanted to encourage managers to use a guide on managing flexibly used a three-pronged approach.

- they promoted it directly to managers, giving them each a copy
- they primed their HR staff to refer to specific information in the guide whenever the managers raised any related issues with them
- they made staff aware of the guide to remind their managers about it at appropriate times.

Regularly reassess needs

Your organisation's needs, the environment in which you are operating and the needs of your employees will change. Regularly check that your approach to work-life balance reflects those changes.

Celebrate your successes

Celebrating your successes will help you:

- maintain a sense of momentum
- reinforce the positive attitudes and behaviours
- ensure your employees and customers know what a great organisation you are to work for.

Strategies used for celebrating success include:

- articles in in-house publications
- internet and intranet
- photographs and displays in the staff cafeteria
- events to launch new initiatives

- inviting key managers to participate in or view activities
- external media coverage.

Making it part of the way you manage

Individual managers are critical to translating work and family policies into action. The best policy statement or the most imaginative programme is easily undermined by managers who expect staff to work long hours at a moment's notice and who penalise those who can't. Holding important discussions at early breakfast meetings or after work will exclude those with dependant-care responsibilities at that time. Managers who snap rather than listen will quickly discourage staff from trying to find practical solutions to work-life balance needs.

There are a number of ways to ensure that current and future managers are proactive about work-life balance.

- ensure management development and leadership programmes address work-life balance issues
- include managers' responsibilities in relation to work-life balance in performance management systems
- link managers who have experience of specific areas, such as flexible working arrangements, with other managers considering that option.
- share the success stories of managers who have found effective ways of tackling difficulties such as redesigning shifts or developing an effective pool of casual employees.
- give managers the chance to openly discuss the difficulties, as well as the benefits, of implementing work-life balance policies and practices

Conclusion

In looking at work-life balance for your organisation, you are joining a growing number of forward-thinking businesses in New Zealand and around the world. There is more and more evidence that effective work-life balance strategies benefit both employees and employers. Sensitivity to work-life balance is now seen as part of sensible management.

Finding and implementing the right combination of win-win solutions to meet the needs of both your organisation and your employees is not necessarily a quick and easy process. Nor is it something you can do once, and then tick off the list as finished. Needs change over time.

However, you don't need to reinvent the wheel. There is an increasing number of role models from which your organisation can learn. If you get stuck, use the resources and organisations suggested at the back of this resource. Talk to other organisations that are looking at work-life balance issues.

Good luck!

Useful websites

New Zealand websites

Department of Labour – Work-life balance
www.dol.govt.nz/worklife/index.asp

In particular the 'Ideas in Action' and the case studies.

Department of Labour – Healthy Work: Managing Stress in the Workplace
www.osh.govt.nz/order/catalogue/3.shtml

A resource aimed at employers and employees.

Department of Labour – Parental leave information
www.ers.govt.nz/parentalleave/

Basic information about the rights and obligations of employees, employers and self-employed persons in respect of parental leave.

Department of Labour – Future of work
www.dol.govt.nz/futureofwork/worklife.asp

Good information on a range of flexible work arrangements.

NZCTU – It's about Time – Union Guide to Work-Life Balance
www.union.org.nz/policy/109996693920232.html

Explores the role of unions, employers and Government in facilitating work-life balance, along with practical steps that each can take.

Mental Health Foundation – A Working Well Toolkit
www.workingwell.co.nz/

Introduces the Working Well programme which is supporting employers and managers to create more mentally healthy workplaces.

EEO Trust – Work-life balance
www.eeotrust.org.nz/awards/index.cfm

In particular, the profiles of the entrants and winners in the EEO Trust Work and Life Awards, the quarterly bulletins and case studies.

State Services Commission – Work-Life Balance. A Resource for the State Services (2005)
www.ssc.govt.nz/display/document.asp?docid=4462

Although this is written for the State Services, much of the content will be relevant to any large organisation.

Neon (National Equal Opportunities Network) – work-life balance and quality flexible work
www.neon.org.nz

Provides a range of information, resources and stories relating to work-life balance and employment practices

International websites

Australia – Government information on employment and workplace relations
www.workplace.gov.au/workplace/Category/SchemesInitiatives/WorkFamily/

A range of information, research and resources on work and family and flexible work

Australia – Flexibility works
www.flexibilityworks.dewr.gov.au

Focuses on the retail sector, but also relevant elsewhere.

Australia – Serving up Flexibility

www.workplace.gov.au/workplace/Category/SchemesInitiatives/WorkFamily/Servingupflexibility-inrestaurantandcatering.htm

Flexibility in the restaurant and catering industry including case studies

Canada – Human Resources and Social Development Canada

www.hrsdc.gc.ca/en/gateways/topics/wnc-gxr.shtml

Useful range of resources, including teleworking

Canada – Human Resources and Social Development Canada

www.hrsdc.gc.ca/en/lp/spila/wlb/imt/08family_friendly.shtml#2

Useful information on family-friendly issues and solutions.

United Kingdom –

www.flexibility.co.uk/viewers/managers.htm

Resources for managers, relevant to managing flexible work arrangements including how to be an effective e-manager and videoconferencing.

United Kingdom –

www.employersforwork-lifebalance.org.uk

Resources for both large and small organisations, for senior managers and operational managers.

United Kingdom – Trade Union Congress (TUC), Changing Times: The TUC Guide to Work-life Balance
www.tuc.org.uk/work_life/index.cfm?mins=377

United Kingdom –

www.direct.gov.uk/Employment/Employees/fs/en

Includes guidance on types of flexible work and statutory rights to request.

United Kingdom – www.businesslink.gov.uk

Includes information on benefits of flexible working, and an interactive tool for employers to get advice on what might be the best flexible work arrangements for their particular circumstances.

United States – Sloan Work and Family Research Network – <http://wfnetwork.bc.edu/>

Useful US-based case studies.