

STEP 3: IDENTIFY THE POSSIBLE SOLUTIONS

A number of companies established new policies and procedures as solutions to issues raised by their staff in the work-life balance consultation. This section contains various examples.

Working From Home - Policy Statement

(Name of company) expects employees to work from their office site except when where there is an approved working from home arrangement.

This is because the office needs access to its employees during working times for information and communication requirements and because employees need a safe and healthy working environment in terms of OSH legislation requirements.

However, it is recognised that in certain circumstances (name of company) and/or the individual may wish to agree to a working from home arrangement.

Working from Home Arrangements

Work from home requirements may arise as part of an on-going contractual arrangement, or more typically, arise on an ad hoc basis due to unexpected events. It must be noted that provisions for Health and Safety should be maintained irrespective of the work location.

For (name of the company) the working from home arrangements will generally fall into either of two categories:

Occasional – this is normally agreed for short periods - usually a day or part day, where it suits the individual and will not impact upon the work of the office.

Long-term – this is normally agreed for situations where an employee does not live within a reasonable commuting distance of an office, and at the time of appointment this was envisaged as part of the employment arrangements. It can also occur when there are significant changes in circumstances and working from home on a long-term basis suits both the office and the employee. It will also cover any arrangement whereby an employee wishes to work from home for a short period but on a regular basis (eg a day a fortnight on an ongoing basis).

Parameters

There are significantly differing considerations that apply to each of these categories. However some basic rules apply to both. These are:

- prior approval from the manager is required
- the job/task is able to be done at home
- staff must remain contactable during regular office working hours while working from home
- staff must be willing/able to return to the office should the need arise
- Health and Safety responsibilities of both (Name of the company) and the staff member are to be observed

- all office policies continue to apply whilst working from home eg the IT policy.

The Occasional Arrangement

An occasional working from home agreement does not have to be covered by a formal written agreement in every instance. However prior to the first instance of an employee working from home, and before approval to work from home is given, the employee must be advised of the principles governing working from home arrangements as set out in this policy, and their responsibilities in terms of office policies and health and safety obligations.

The fact that they understand and accept these principles and responsibilities needs to be recorded and placed on their personal file. This undertaking will then apply to all future occasional periods of working from home.

It is appreciated that on some occasions the need to work from home will arise suddenly, and advance notice can not be given. Where advance notice is practicable it is suggested that a log is kept where the employee records in advance the following details:

- when they will be working from home
- how they can be contacted
- the reason for the employee working from home.

The manager (or other nominated person) should initial this as seen and approved prior to the period of working from home.

Long-term Arrangement

Long-term working from home arrangements must be covered by a written agreement and approval sought from (the nominated person) prior to the agreement being signed.

In general the key issues that need to be considered prior to approving a long term working from home arrangement, in addition to those listed previously, are:

- identification of additional costs and a clear decision as to who pays eg: whether there needs to be reimbursement for costs of attending training and the like. Examples of these costs are:
 - attendance at area training both travel and accommodation
 - additional overnights stays
- whether the additional costs are warranted
- whether there is any additional cost of meeting OSH requirements in the home, and where OSH requirements need to be met in the home, whether the manager has provision in their budget for meeting them
- any impact on aspects of team fit /culture
- whether the employee's style of working suits working from home
- what impact the employee working at home will have on other staff.

Attached at Appendix A is further information about the agreement.

Key Principles for Managing Leave

Managing leave effectively is the joint responsibility of managers and employees.

Employees have a right to take leave, as specified in their employment agreement and under the Holidays Act 2003. However the timing of this leave needs to take account of:

- the operational needs of (nominated department)
- the needs and preferences of individual employees
- the impact of leave on the rest of the team.

These principles have been established to allow managers and employees to achieve an effective balance between these competing factors. There will always be times when managers are not able to approve requests for leave, however following these principles will increase the chance that they can say 'yes'.

Leave must not jeopardize the operation of (name of company) or our standard of service.

Appropriate employee levels, with people having the necessary mix and levels of skills will be needed to meet anticipated work demands. Where possible, departments will document what these employee levels need to be and make these available to employees. Leave should not impact negatively on other employees by creating unfair and unsustainable workloads.

Taking a significant break from work each year is critical to the health and well-being of employees, and to their commitment and energy for work.

Employees are encouraged to take at least two weeks of their leave as consecutive days. Planning of long breaks should be encouraged by managers to allow employees to get a sustained break and to make scheduling of this leave easier.

Planning leave in advance benefits employees and (name of company).

Each department will identify the times of the year when work demands mean that leave will not be able to be granted, except in emergencies or rare exceptions. Each department will make sure that all their employees know when these times are and why they are difficult.

Employees are encouraged to request the leave they want as early as possible. Leave requests at the last minute are harder to plan for and are less likely to be granted. Managers will prompt employees regularly to consider their leave needs over the next period and to put in requests for leave well in advance. Requests can be accepted up to six months in advance

Managers will endeavour to let employees know whether their leave has been approved or not within two weeks of their application. When leave requests cannot be approved, the manager will advise the employee and where possible explore any other options that may be available. When leave requests cannot be

granted, employees will be asked if they would like their request kept on a 'stand-by' basis, so that if circumstances change, their request could be reactivated.

Aim to be fair

Sometimes there may be competing requests for leave. The manager will look for solutions by:

- asking the employees to consider whether they have any flexibility as to when they take their leave and offer the closest available periods
- assisting employees, when and where appropriate, to discuss the situation amongst themselves or their team, to find a mutually acceptable solution.

If a solution cannot be found, the manager will consider the requests against the following criteria:

- how long since the employee last had leave and when was their last long break?
- the impact of not being able to take the leave on the employee, their family or community
- what will the effect be on the rest of the team if the employee takes leave at this time and how can this be mitigated?
- the degree of flexibility the employee has around when the leave can be taken
- length of service
- how flexible the employee has been in the past in taking leave
- if the leave is at a major holiday, when did the employee last have a break at this time?

TEMPLATE FOR CHANGING WORK PRACTICES

One company set up a template for changing options of working practices, how they can be utilised/applied, who plays what role in their adoption and identifies things to consider if adopted.

PRACTICE [insert the name of the practice]

DESCRIPTION: [insert a description of how the practice operates]

CURRENT AREAS OF USE: [insert the business unit or work area that currently use this practice]

MATTERS TO CONSIDER: [insert the key matters to consider if an area or person is going to adopt this work-life balance practice. Also include the learnings that you may have had along the way]

PROCESS FOR ADOPTION AND IMPLEMENTATION: [in this section we insert how this practice would be adopted and implemented. Particularly who is responsible for what, on the basis that there should be as much self help as possible rather than simply making it something to be solved by the manager]

RULES OF OPERATION: [Insert the way the practise will operate and any conditions that exist]

DURATION AND REVIEW: [insert any limitation on the duration of the practice, conditions that need to prevail for it to operate and review mechanisms]

Appendix A

Long-term Agreement for Working from Home

To assist with the decision to approve a long-term arrangement for working from home the following outlines the details required for the written agreement. The agreement can be in a letter form.

Written Agreement

A working from home agreement sets out the conditions and responsibilities that will apply to the work being carried out from home by the employee.

Specifically such an agreement should:

- be in a written form and signed by both the manager and the employee as a record of their acceptance and understanding of the agreement
- state a date from which the working from home arrangement is effective and an end date, at which stage the arrangement may be reviewed
- include a specific list of equipment that has been provided for the employee by (name of company)
- state how the manager and the employee will keep in contact during the working from home arrangement
- state the expectations with respect to the employee's attendance at team meetings, training and the like
- state the minimum number of working hours per week required by the manager in terms of the contractual arrangement with the staff member and that work records must be completed (ie time recording)
- state that the employee will ensure that their home environment complies with the minimum health and safety standards
- state that all terms and conditions of the employee's contract of employment with the office, including the company's Code of Conduct, (name of company) Policies and Procedures including (Information Technology User Policy, and Code of Ethical Conduct), will continue to apply
- state that where employees are using computer equipment they will observe good practice. In particular the employee must advise the office of any issues that arise as a result of the use of computer equipment.