

WORK-LIFE BALANCE.

Checklist 193

» INTRODUCTION

The need for employees to enjoy a reasonable balance between their work and other aspects of their lives is now widely accepted. Work-life balance has been shown to have real business benefits, including increased productivity, improvements in performance and competitiveness, better morale, and lower levels of stress, absenteeism and sickness. It can help to enhance employee motivation and retention and support recruitment. In the UK, it is now government policy to promote work-life balance and to support working families.

Work-life balance, and in particular flexible working practices and family-friendly policies, has been the subject of widespread public debate. This has arisen from social and economic changes, such as greater numbers of women in the workforce, the expectations of younger employees - Generation X (born between 1965 and 1980) and Generation Y (born between 1979 and early 2000s), the rise of the 24/7 society and technological advancements. There has also been a growing backlash against what has been dubbed the 'long-hours culture' which puts employees under pressure to work additional hours, regardless of the impact on their personal lives, health or well-being.

For employers it is important to consider how to give employees more control over their working arrangements, in order to accommodate other aspects of their lives, without adversely affecting the capability of the organisation to deliver on targets and objectives. It is important, when introducing work-life balance policies, to balance the benefits to individual employees with arrangements to manage the operational implications for the organisation as a whole. This checklist takes an organisational approach to work-life balance, covering assessing the needs of employees and establishing work-life policies and benefit arrangements.

» DEFINITION

Work-life balance is the equilibrium between an individual's priorities at work and their priorities in other aspects of life. With good work-life balance, work/home conflict is minimised so that the demands of work do not prevent a person from gaining satisfaction from their life outside work, while aspects of their personal life do not spill over to exert a negative impact on their work.

» ACTION CHECKLIST

1. Find out what employees' needs are, and how far they are being met

Find out what types of work/home conflicts your employees are experiencing. You might assess personal circumstances, for example, the proportion of employees with young children or elderly dependants, and the impact of home commitments in terms of time absent from work, for example. Exit interviews can be used to discover whether work-life balance issues are contributing to the departure of employees. You could also set up focus groups or conduct surveys, explaining why you are doing so and following up on the results.

Be aware that different things matter to different individuals, and these are likely to vary over time. One person may place a high priority on flexibility due to caring responsibilities while another values flexibility because of study commitments. The right balance for any individual will change over the course of their career, and

perhaps also in the shorter term, for example to fit around school holidays or depending on the level of support they are getting at home.

2. Build the business case

Use your findings to identify what kind of measures would do most to improve the work-life balance of employees in your organisation and to establish a business case for improving work-life balance which can be related to the bottom line. Draw on the results of independent research to support your case. Communicate your ideas to influential people within the organisation, and to interested parties such as staff associations and trade unions. Involving employees in discussions from the start will help overcome resistance to change, as will ensuring that your work-life policy is inclusive and that everyone can benefit from it.

Before proceeding, it is vital to identify financial resources and key personnel which will be needed to implement and maintain policies and programmes. At the same time, take into account the costs of not offering flexible arrangements e.g. loss of key employees, costs of recruitment and training etc.

3. Focus on the culture of your organisation

Every workplace has its own culture. For any work-life balance initiatives to work they need to be compatible with the existing culture of the organisation. Think about the vision, mission and values of your organisation and consider how initiatives to support work-life balance can be aligned with what your organisation says it stands for. Focus on building links between proposed measures and values - remember that people work not just for money but also for the satisfaction they gain from contributing to a shared purpose. Make sure that employees understand why they are doing the work they do and how it contributes to organisational objectives.

The culture of your organisation needs to be conducive to flexibility, innovative work practices, empowerment and trust. The introduction of policies such as flexible working relies on trust between managers and employees and a willingness to empower employees to work in the ways that suit them best. While managers will naturally wish to ensure that such arrangements are not abused, employees need to feel that they are trusted to get the job done. Any suspicion that those who work flexibly will be regarded as less committed to their work or are likely to be poor performers must be avoided. The emphasis should be on outputs and outcomes, i.e. performance and results, rather than on inputs or presenteeism.

Trust is a great motivator and the introduction of flexible or home working is an opportunity to show employees that you trust them, building better relationships and improving intrinsic motivation. Those working from home may not work standard office hours but are often motivated to put additional discretionary effort or time into their work. It is also important for managers to set a good example, and for work-life balance to be integrated into the culture of the organisation at all levels, not just the lower grades.

4. Consider the structure of your organisation

Look at the organisation's structure, and consider whether it enables or undermines work-life balance. A traditional hierarchy with a command-and-control approach to management may present a challenge for the effective implementation of new measures to enable flexibility - in such cases you will need to build a strong case for change, using research evidence to make the business benefits in terms of staff retention and productivity very clear. It may be easier to introduce flexible working practices in a flatter organisation where employees work in teams and are empowered to make decisions and plan their own work.

5. Improve personal and organisational efficiency

An important part of achieving work-life balance is ensuring that the "work" part of the equation is carried out as smoothly as possible. Time management, delegation, prioritising, and handling information to avoid overload are all skills that can reduce both the experience of stress and the hours worked, whilst maintaining the same level of productivity. Such measures could have a positive effect on home life, for example, by eliminating the need for employees to take work home, or meaning that they are less tired and stressed when they get home. Consider ways in which organisational procedures and activities could be improved in order to reduce overlaps and inefficiencies, making employees' working lives less frenetic, stressful, or tiring.

Consider the possibility that in flatter less hierarchical organisations, some employees may be able to take on greater responsibilities enabling others to reduce their workloads.

6. Consider the options

There is no single approach that will create work-life balance: a flexible set of work-life policies and benefits should be set up to cover as many different situations as possible. Consider the following:

- › **Flexible working hours** – allowing employees to organise their working hours so as to accommodate important aspects of their home lives
- › **Annualised Hours** – allowing employees vary their working hours throughout the year: working a minimum number of hours a day at times of low activity, but also a maximum daily number in peak work periods
- › **Self-rostering** – teams of employees negotiating and agreeing their own hours to accommodate each others' needs. Compromises may be needed here
- › **Buddy system** – pairing people up so that they can cover for each other, enabling each to take time off when necessary, knowing that someone else will take over their duties and responsibilities
- › **Flexible working location** – remote working brings its own set of challenges for organisations and individuals. However, working from a different office or from home, either permanently or on an ad hoc basis, may help employees cope with family responsibilities and reduce or eliminate commuting time
- › **Special leave** – consider, for example, an allowance of paid or unpaid leave each year, to give employees time to cope with personal crises, and family and household emergencies, without using up their holiday allowance. Note that in the UK it is now a legal requirement for employers to allow all employees may take reasonable (unpaid) time off work to undertake necessary and unexpected care for a dependant
- › **Career breaks** – these could be of varying length, and used for study, travel, bringing up children, voluntary work, or many other activities that can improve both home and working life
- › **Health, wellbeing and employee assistance programmes** - offer counselling and advice services, and not just for work related issues. Private health insurance and gym subsidies could also be considered
- › **Childcare/eldercare subsidies** – a workplace nursery may not be feasible, but subsidised places in local nurseries or nursing homes may be an option
- › **Phased retirement** – allowing employees to continue working part time and defer or stagger their receipt of pension benefits. The abolition of default retirement age in the UK has led to an increase in the up-take of this option.

7. Take practicality into account

When deciding on the policies to be introduced and the options to be offered aim to strike a balance between employee benefits and the operational needs of the business. Consider the practical implications of each proposal carefully and think through which, if any, procedures may need to be introduced to approve and manage take-up of benefits. Offering choices which turn out to be unworkable and have to be withdrawn will only cause disappointment and even resentment and will undermine trust.

It may not be possible to cater for every situation, but in this case a flexible benefits package could be considered. One way to do this is to set out a list of priced benefits, and give each employee a fixed annual allowance to “buy” whichever benefits they choose from the package. Alternatively, certain benefits could be bought from salary as required. For further information see our checklist on introducing flexible benefits (See Additional resources below.)

Take employees' ideas into account. If an employee can make a business case for a change to his or her way of working, then the feasibility of the idea should be investigated. This kind of suggestion scheme may prove more responsive to individual circumstances than a rigid set of policies and practices and can provide real benefits to business profitability.

8. Launch the initiative and communicate the benefits

Success depends not just on the policies chosen, but on how they are implemented. Consider how to launch the scheme and select a range of channels to communicate the benefits to all, for example: staff meetings, departmental and team briefings, strategically placed posters, email messages and intranet postings. Stress that the take-up of flexible options will in no way affect promotion prospects, recognition, or other job opportunities. Ensure that all employees have ongoing access to information about the options available and know who to contact if they are interested in taking advantage of them. Include information on policies and programmes in staff induction programmes.

9. Inform and train managers

It is vital to ensure consistent practice across the organisation. Line managers should receive information on the range of benefits available, and training in providing guidance to employees on combinations which will work well. Work-life issues could be incorporated into annual performance and development reviews. Bear in mind that balance cannot be “imposed” but that employees can assist employers in deciding on the most appropriate options.

10. Evaluate success

It is important to maintain the advantages of a good work-life policy by keeping it relevant and up to date. Evaluate the effectiveness of your policies by measuring employee satisfaction and performance, and by assessing factors such as staff retention rates. You should be able to demonstrate that your policies produce a positive impact on the company’s bottom line, on staff and customer satisfaction and retention, and on the climate within the organisation.

Do not limit performance evaluation to an annual review. Consider meeting every four months to check how things are going. Careful monitoring, feedback, and adjustment will help to ensure that the policies work well.



POTENTIAL PITFALLS

Managers should avoid:

- › trying to “impose” work-life balance, or introduce it without consultation and co-operation
- › assuming that work-life balance is only relevant to women with children or employees with elderly dependants
- › failing to monitor and evaluate the impact of policies
- › thinking that flexibility is only appropriate in certain work settings
- › wrapping the new arrangements up in bureaucratic procedures. Accessing the new arrangements should be simple and straightforward.



ADDITIONAL RESOURCES

BOOKS

The digital renaissance of work: delivering digital workplaces fit for the future, Paul Miller and Elizabeth Marsh

Farnham: Gower, 2014

This book is also available as an [e-book](#).

Smart flexibility: moving smart and flexible working from theory to practice, Andy Lake

Farnham: Gower, 2013

This book is available as an [e-book](#).

The activity illusion: why we live to work in the 21st century - and how to work to live instead, Ian Price

Kibworth Beauchamp: Matador, 2011

The see saw: 100 ideas for work life balance, Julia Hobsbawm

London: Atlantic Books, 2009

The third worklife balance employee survey main findings, Hulya Hooker and others

London: Institute for Employment Studies, 2007

This is a selection of books available for loan to members from CMI's library. More information at:

www.managers.org.uk/library

JOURNAL ARTICLES

Developing individual and organisational work-life balance strategies to improve employee health and wellbeing, Connie Zheng and others
Employee Relations, vol 37 no 3 2015, pp 354-379

Positive and negative spillover from work to home: the role of organizational culture and supportive arrangements, Jenny Sok, Rob Blomme and Debbie Tromp
British Journal of Management, July 2014 vol 25 no 3, pp 456-472

Supportive work–family environments: implications for work–family conflict and well-being, Lisa Michelle Fiksenbaum
International Journal of Human Resource Management, vol 25 no 5, pp 653-672

These articles are available for members to download from CMI's library. More information at www.managers.org.uk/library

RELATED CHECKLISTS

- 026** An introduction to implementing flexible working hours
- 238** Introducing flexible benefits
- 232** Understanding organisational culture
- 152** Managing for diversity
- 062** Introducing an equal opportunities policy

INTERNET RESOURCES

Gov.uk Flexible Working <https://www.gov.uk/flexible-working>
Information on the statutory right to request a flexible working pattern.

Great Business – Flexible working <http://www.greatbusiness.gov.uk/flexible-working/>
Guides and FAQs for employers concerning flexible working arrangements

Work Foundation – Flexible working <http://www.theworkfoundation.com/difference/e4wlb.aspx>
Information on various aspects of work-life balance, including links to Work Foundation reports, news, blogs and events.

ACAS www.acas.org.uk
Advice for employers can be found under Flexible Work in the Advice A to Z.

ORGANISATIONS

Working Families, 1-3 Berry Street, London, EC1V 0AA
Tel: 020 7253 7243 Web: www.workingfamilies.org.uk

Work-Life Balance Centre, 5 Nethercote, Newton Burgoland, Leics, LE67 2ST
Tel: 01530 273056 Web: www.worklifebalancecentre.org



NATIONAL OCCUPATIONAL STANDARDS FOR MANAGEMENT & LEADERSHIP

This checklist has relevance to the following standard:

- Unit DB9 Promote staff wellbeing
- Unit DB7 Manage flexible working



MORE INFORMATION

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