Work-life Balance Checklist 193

Introduction

The need for employees to have a reasonable balance between work and other aspects of life is now widely accepted and work-life balance is seen to have real business benefits, including increased productivity, improvements in performance and competitiveness, better morale, and a lower incidence 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 in particular 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 come about as a result of social and economic changes, such as greater numbers of women in the workforce, the expectations of younger Generation X (born between 1965 and 1980) and Generation Y (born between 1979 and early 2000s) employees and the rise of the 24/7 society and technological advancements. There has also been a growing backlash against what has been called a ‘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. This checklist takes an organisational approach to work-life balance, covering assessment of the needs of employees and the establishment of work-life policies and benefit arrangements.

Definition

Work-life balance is the equilibrium between the amount of time and effort a person devotes to work and that given to other aspects of life.

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 follow up with the results. Use the results to establish a business case for improving work-life balance which can be related to the bottom line. Communicate your intentions to the most influential people in the organisation, and to interested parties such as staff associations and trade unions. Involving employees from the start will help overcome resistance to change as will ensuring that your work-life policy is inclusive and that every individual can benefit from it.

Before proceeding, it is vital to identify financial resources and key personnel which will be needed to carry out the implementation and maintain it. At the same time, consider the costs of not offering flexible arrangements e.g. loss of key employees, costs of recruitment and training etc..
2. **Focus on organisation culture**

The culture and atmosphere of your organisation needs to be conducive to flexibility, innovative work practices, and empowerment. Focus on building values - remember that people work not just for money but also because the get satisfaction from doing the right things. Give them a reason to do what they are doing. Managers have to ensure that flexible benefits will not be abused, but employees must not be made to feel disloyal, or that they will be regarded as poor performers if they take advantage of the benefits. The emphasis should be on outputs and outcomes, i.e. performance and results, rather than on inputs and presenteeism.

Look at the organisation structure, and consider whether it enables or constrains work-life balance. A traditional hierarchy with a command-and-control approach may not be suited to effective implementation of the new measures that may be necessary. A flatter organisation, in which employees work in teams and are empowered, may make this easier.

It is 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.

3. **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 stress experiences and the hours worked, while maintaining the same level of productivity. This could have a positive effect on home life, for example, by eliminating the need to take work home, or meaning that employees are less tired and stressed in the evenings.

Consider ways in which organisational procedures and activities could be improved in order to make employees’ working lives less frenetic, stressful, or tiring.

Consider the possibility that in flatter less hierarchical organisations, flexible working arrangements may result in some employees taking on more in order for others to do less.

4. **Set up work-life policies and benefit arrangements**

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

- **Flexible working hours** – allowing employees to organise working hours to accommodate important aspects of their home lives
- **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 availability** – 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
- **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.

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.

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 idea should be tested. This kind of suggestion scheme may prove more responsive to individual circumstances than a rigid set of policies and if tied to monetary reward. This can provide real benefits to business profitability.

5. Inform and train managers

Success depends not just on the policies chosen, but on how they are implemented. This must be consistent across the organisation. Managers should receive training in the range of benefits available, and in providing guidance to employees on combinations which will work well. Work-life issues could be incorporated into annual training plans and performance appraisals. Bear in mind that balance cannot be “imposed” but that employers can assist employers in deciding on the most appropriate options. It should be stressed that take-up of flexible benefits should in no way affect promotion prospects, recognition, or other job opportunities.

6. Communicate the policies and benefits

Inform employees of the options available. Consider posting details on the company intranet.

7. Evaluate work-life balance success by measuring employee and customer satisfaction

It is important to maintain the advantages of a good work-life policy by keeping it relevant and up to date. By measuring employee satisfaction, performance, and assessing factors such as retention rate, the effectiveness of the policies can be evaluated. The policies should have 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 four months to check how things are going. Careful monitoring, feedback, and adjustment will ensure the policies work well.

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
- thinking that flexibility is only appropriate to certain work settings
- wrapping the new arrangements up in bureaucratic procedures. Accessing the new arrangements should be simple and straightforward.

National Occupational Standards for Management and Leadership

This checklist has relevance to the following standard:
D: Working with people, unit 3

Additional resources

Books

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

Work life policies in Great Britain : what works where and how, Sadia Nadeem and Hilary Metcalf
London: Department for Business Enterprise and Regulatory Reform, 2007
The third worklife balance employee survey main findings, Hulya Hooker and others

Moving mountains the culture change challenge, Anna Allan

This is a selection of books available for loan to members from CMI’s library. More information at www.managers.org.uk/library

Related checklists

- Implementing a diversity management programme (152)
- Introducing an equal opportunities policy (062)
- An introduction to implementing flexible working hours (026)

Internet resources

Direct.gov - Who can request flexible working?
http://www.direct.gov.uk/en/Employment/Employees/Flexibleworking/DG_10029491
Information on the statutory right to request a flexible working pattern.

Employers and work-life balance, Work Foundation
http://www.theworkfoundation.com/difference/e4wlb.aspx
Information on various aspects of work-life balance, including case studies and Work Foundation reports.

Business Link www.businesslink.gov.uk
A guide to flexible working and an interactive tool to help choose the right type of flexible working are available in the Employing People section, under Working time and time off.

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

The Working Lives Research Institute, London Metropolitan University 31 Jewry St, London EC3N 2EY
Tel: 020 7320 3042 Web: http://www.workinglives.org

This is one of many checklists available to all CMI members. For more information please contact

t: 01536 204222   e: enquiries@managers.org.uk   w: www.managers.org.uk

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