FLEXIBLE WORKING:
THE IMPLEMENTATION
CHALLENGE
Flexible working: the implementation challenge

- a CIPD guide to help employers effectively manage flexible working arrangements to benefit their people and business performance

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Introduction: From rhetoric to reality

Businesses are realising that flexible working is something they can’t ignore.

More women work, the population’s ageing and more of us will take on caring responsibilities. Organisations are competing for talent in a tight labour market. Technology’s changing the way we work. And more businesses need to deliver services on a 24/7 basis.

The number of workplaces offering staff the opportunity to work flexibly has almost doubled in the last six years, according to the latest ACAS- and DTI-sponsored Workplace Employment Relations Survey (WERS). Managers are also beginning to show more understanding of employees’ responsibilities outside work. Whereas, in 1998, 84 per cent of managers believed it was up to an individual employee to balance their work and family responsibilities, by 2004, this had decreased to 65 per cent.

Recent CIPD research also demonstrates that flexible working policies are now becoming the norm in organisations. Four in five employees surveyed reported that their employer offers some form of flexible working. The research also highlights the potential benefits of flexible working from an employer’s perspective in such areas as improved retention, recruitment and a positive psychological contract.

The challenge, however, lies in moving from the rhetoric surrounding flexible working to the reality of effective implementation and the chance to realise these benefits.

This guide’s main focus is to provide an insight into how organisations are addressing the issue of delivering flexible working so that it works for the business and the individual.

The research
Interviews took place with a range of public and private sector organisations in early 2005 to explore:

- what flexibility means to them
- how and why they were making use of flexible working
- the challenges and keys to effective delivery of flexible working arrangements.

In addition to interviewing HR staff, where possible, interviews also took place with line managers and employees.

The organisations featured in this report – and where they appear – are shown in Table 1 overleaf.

This guide is also informed by the findings of the CIPD’s most recent survey on flexible working, *Flexible Working: Impact and implementation*, published in February 2005.

A total of 585 HR professionals from a range of public and private sector organisations participated in this survey.
### Table 1: Featured organisations

<table>
<thead>
<tr>
<th>Industry sector</th>
<th>Description of organisation</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>Britannia Building Society</td>
<td>Mutual building society with a network of 252 branches and Head Office in Leek. Ca. 4,000 employees.</td>
<td>12, 22, 38, 39, 40</td>
</tr>
<tr>
<td>Centrica</td>
<td>Parent company of British Gas and OneTel. It also has interests in other energy companies in Europe and North America. Ca. 30,000 employees in the UK.</td>
<td>13, 42, 44, 56</td>
</tr>
<tr>
<td>DSTL</td>
<td>The Defence Science and Technology Laboratory is the centre of scientific excellence for the Ministry of Defence (MoD). Ca. 3,000 employees at four main sites in the South-east.</td>
<td>27, 34, 46, 55</td>
</tr>
<tr>
<td>Ernst &amp; Young</td>
<td>Global professional services firm with ca. 7,400 staff in the UK in London and 20 other locations.</td>
<td>8, 15, 23, 35, 49</td>
</tr>
<tr>
<td>Loop Customer Management</td>
<td>Outsourced contact centre operation with ca. 560 employees. Loop's parent company is Kelda and its sister company is Yorkshire Water.</td>
<td>12, 30, 45</td>
</tr>
<tr>
<td>Oxford Brookes University</td>
<td>University with ca. 850 academic staff and ca. 1,300 administrative staff based at 3 campus locations.</td>
<td>11, 41, 53</td>
</tr>
<tr>
<td>Serco Group plc</td>
<td>International task management company providing facilities management and systems engineering across a wide range of applications. Ca. 32,500 employees in the UK, including joint ventures.</td>
<td>9</td>
</tr>
<tr>
<td>Scottish Legal Aid Board</td>
<td>Non-departmental public body responsible for managing legal aid in Scotland. Ca. 350 employees.</td>
<td>14, 26, 32, 33, 50–51, 52, 57</td>
</tr>
<tr>
<td>Rotherham Metropolitan Borough Council</td>
<td>Local authority with ca. 14,000 employees.</td>
<td>47</td>
</tr>
<tr>
<td>St Mungo’s</td>
<td>London-based homeless charity which undertakes outreach work and runs over 70 housing projects. Ca. 850 employees.</td>
<td>20</td>
</tr>
<tr>
<td>London Borough of Sutton</td>
<td>Greater London Borough with ca. 5,800 employees.</td>
<td>29</td>
</tr>
<tr>
<td>Telewest</td>
<td>Broadband communications and media group with ca. 9,000 employees at 66 sites in the UK.</td>
<td>24–25</td>
</tr>
</tbody>
</table>
Part 1 What is flexibility?

‘Flexibility is a way to help people work, work effectively and for the organisation to meet its goals.’ Simonetta Manfredi, Director, Centre for Diversity Policy Research, Oxford Brookes University

‘It’s about balancing between service delivery and meeting individual needs. Flexibility is creating a win–win situation.’ Helen Gibbs, Senior Personnel Adviser, London Borough of Sutton

The term ‘flexibility’, when applied to the world of work, can have a range of meanings. While these are not mutually exclusive, they can be categorised as:

- **The concept of a ‘flexible labour market’**
  The Treasury describes a flexible and efficient labour market as having ‘the ability to adjust to changing economic conditions in a way that maintains high employment, low inflation and unemployment, and continued growth in real incomes’. From an organisational perspective, this is likely to translate as the ease with which managers are able to respond to market pressures as they strive to meet the demands of their customers or clients.

- **Numerical flexibility**
  This means arrangements for altering the size of the workforce using temporary, fixed-term and agency staff.

- **Functional flexibility**
  This refers to training employees so they’re able to perform a wider range of tasks.

- **Flexible working**
  This relates to an organisation’s working arrangements in terms of working time, working location and the pattern of working.

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**Flexible working: types of practice**

- **Part-time working**: Work is generally considered part-time when employees are contracted to work for anything less than full-time hours.
- **Term-time working**: A worker remains on a permanent contract but can take paid/unpaid leave during school holidays.
- **Job-sharing**: A form of part-time working where two (or occasionally more) people share the responsibility for a job between them.
- **Flextime**: Flextime allows employees to choose, within certain set limits, when to begin and end work.
- **Compressed hours**: Compressed working weeks or (fortnights) don’t necessarily involve a reduction in total hours or any extension in individual choice over which hours are worked. The central feature is reallocation of work time into fewer and longer blocks during the week.
- **Annual hours**: The period within which full-time employees must work is defined over a whole year.
- **Working from home on a regular basis**: Workers regularly spend time working from home.
- **Mobile working/teleworking**: This permits employees to work all or part of their working week at a location remote from the employer’s workplace.
- **Career breaks**: Career breaks, or sabbaticals, are extended periods of leave – normally unpaid – of up to five years or more.

These descriptions are based on ACAS guidance.
Organisations involved in research for this guide were asked what they understood by ‘flexibility’. Their answers most commonly fitted with the fourth interpretation – flexible working – and its potential ability to benefit both the employer and the employee.

Flexible working is the focus for this guide. The advice and suggestions provided here can therefore be applied to the operation of the types of practice in the box on page 6.

The 2005 CIPD survey report, Flexible Working: Impact and implementation, provides an indication of the degree to which these flexible working arrangements are used by UK organisations (see Table 2).

**Not just about legislation**

This survey also shows us that organisations don’t just define flexible working in terms of the scope of the legislation regarding the ‘right to request’ flexible working introduced in April 2003. It found almost four in ten (38 per cent) of employers extended the right to request flexible working beyond those groups currently covered by the Employment Act 2002. At present, these include parents of children aged under six, or a disabled child under eighteen, although the DTI has been consulting regarding proposed changes to extend the legislation.

**Not just about formal policies**

The survey findings also show that where a flexible working option is available, this didn’t automatically mean the organisation operated a formal policy in this area (or, as Table 2 shows, that it is available to all employees). Compressed hours and working from home on a regular basis, for example, are significantly more likely to be arranged informally.

**Different context, different perceptions of flexibility**

In spite of these common themes, unsurprisingly, we found each organisation’s understanding of flexibility varied depending on the nature of the organisation, their business and the type and style of work carried out by employees.

This can be seen in the next two case studies from Ernst & Young, a professional services firm, and Serco, a large and varied business with many jobs that are not desk-based.

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**Table 2: Organisations’ current practices regarding flexible working, by availability (%)**

<table>
<thead>
<tr>
<th>Flexible Working Option</th>
<th>Total Availability</th>
<th>Available Only to Some Staff</th>
<th>Available to All Staff</th>
</tr>
</thead>
<tbody>
<tr>
<td>Part-time working</td>
<td>86</td>
<td>43</td>
<td>43</td>
</tr>
<tr>
<td>Term-time working</td>
<td>38</td>
<td>23</td>
<td>15</td>
</tr>
<tr>
<td>Job-sharing</td>
<td>63</td>
<td>34</td>
<td>29</td>
</tr>
<tr>
<td>Flexitime</td>
<td>55</td>
<td>34</td>
<td>21</td>
</tr>
<tr>
<td>Compressed hours (eg 4-day week)</td>
<td>47</td>
<td>32</td>
<td>15</td>
</tr>
<tr>
<td>Annual hours</td>
<td>28</td>
<td>20</td>
<td>8</td>
</tr>
<tr>
<td>Working from home on a regular basis</td>
<td>55</td>
<td>48</td>
<td>7</td>
</tr>
<tr>
<td>Mobile working</td>
<td>27</td>
<td>24</td>
<td>3</td>
</tr>
<tr>
<td>Career breaks/sabbaticals</td>
<td>42</td>
<td>17</td>
<td>25</td>
</tr>
</tbody>
</table>

Base: 585  

‘Progressive employers are flexible employers,’ say Ernst & Young. And in today’s diverse world, organisations ‘can’t afford to not recognise this’.

Ernst & Young’s flexible working approach is directly linked to its priority of making the firm the best place to be. The firm is keen to create a diverse workforce, and offering a flexible working policy allows a wide range of people to fit work into their lifestyle. With accountants in demand, attracting and retaining talented people who can progress quickly is a priority. Flexible working is beneficial to the individual and to the firm.

In addition to the formal flexible working policy, the firm looks to promote flexibility with broader work–life balance activities such as:

- ‘Managing the Pace’ workshops run by BUPA Wellness. There are two versions of the workshop: one for managers who want to understand more about identifying and managing stress in others; and one for individuals who want to learn about managing stress for themselves.

- lifestyle services within some of the firm’s larger offices, which include chiropody, massage and physiotherapy

- the emphasis on health and well-being. Everyone in the firm is entitled to a firm-funded health assessment after a qualifying period of service. A dedicated intranet site, HealthEY, contains details of the firm’s health promotions and the benefits available to employees. Also, recent initiatives include a Health Day in Ernst & Young’s Birmingham office.

- the Employee Assistance Programme and Occupational Health Services.

Matthew Thomas and Kathryn Hawkey, Ernst & Young
Serco is a large and varied business. It has a number of divisions, including:

- transport (eg running a rail company)
- home affairs (eg running detention centres and offering services to courts and prisons)
- defence (eg air traffic control and pilot training)
- government services (eg facilities management for schools, leisure centres and hospitals).

There are particular challenges linked with some of the kinds of jobs their people do.

For some jobs, ‘being there’ all the time is essential – for example, a prison officer or train driver.

In many of the areas in which we work, opportunities for flexible working are limited because the work has to be carried out in a specific location and/or because it has to be done at certain times and fit in with designated shift patterns. However, we try to be flexible in terms of the hours that people work, even if we cannot be flexible over the location. We need to look around the business for opportunities – which could be difficult in some areas, but not impossible.

In broader terms, however, Serco is very flexible – to the point where Anne Woolcott, Head of Employment Policy, says that ‘it can feel quite disorganised! We really encourage our businesses to use their initiative and come up with solutions that are right for them. People from all parts of the business may be pulled in to support ad hoc projects when needed, as we do not have a large central team. For employees, this means they can be seconded to very different parts of the organisation, which may also give them opportunities to travel.’

Anne Woolcott, Serco Limited
Part 2 Why are organisations using flexible working?

‘The business case for flexible working was built on the idea of significant commercial property savings and promoting Centrica as an employer of choice.’ Carol Thwaites, work:wise Project Manager, Centrica

‘Customers expect us to be open when they want to call us, not Monday to Friday, nine to five.’ Peri Thomas, HR Manager, Loop

‘Flexible working makes sense... employees will inevitably require flexibility from their employer at some point during their working lives. For us it is a very practical thing. There are plenty of other call centres near Birmingham – offering flexibility will help aid attraction and retention.’ Surinder Gill, HR Manager, Telewest

The legislative ‘right to request’ flexible working (which has been in effect since April 2003) is certainly not the only reason that organisations are looking to make use of flexible working.

The CIPD’s survey showed that ‘to help retain staff’ – and, linked to this, ‘to meet employees’ needs’ – topped HR professionals’ list of reasons for using flexible working practices. Over one-third of those surveyed also highlighted ‘supporting business needs’ and ‘to meet customer needs’ as very important reasons for using flexible working practices (see full results in Figure 1).
Most organisations involved in the research for this guide were making use of flexible working arrangements to meet a combination of their particular organisation’s goals.

Where flexible working arrangements appeared to work best was where they provided an opportunity to help meet two out of three, or ideally all three out of three, of the following demands:

• organisational needs
• individual needs
• customer needs.
(See Figure 2.)

The following case study examples from Oxford Brookes University, Loop, Britannia Building Society, Centrica, the Scottish Legal Aid Board and Ernst & Young provide an illustration of how these factors interact in practice, as flexible working is used to help meet a combination of organisation goals.

**Oxford Brookes University: flexibility as part of the wider HR strategy**

The University adopted its human resources strategy in 2002… [Two of its main strands are] recruitment and retention and equality of opportunity at work, and they underpin the development of the University's policies for work–life balance and flexible working arrangements.

The widespread shift in terminology from ‘equal opportunities’ to ‘diversity management’ reflects a recognition that employers will increasingly have to take account of the diversity of their employees’ cultural, social and personal lifestyles if they are to offer a genuine equality of opportunity to fulfil their personal potential and make the best contribution at work.

[This] is reinforced by the parallel recognition that if the University is to recruit and retain some of the best academic and administrative talent that is available, it is more likely to do so if it can demonstrate a genuine capacity for flexibility in the patterns of working time that are available to its staff.

Bob Price, Director of Human Resources
Loop: flexible working and its link to the client proposition

Loop is a business providing outsourced customer service to companies such as Yorkshire Water, the Wales Tourist Board and a variety of insurers.

On the one hand, there is the kind of customer-driven flexibility demanded by a seven-day-a-week, early- until-late operation. Being able to cover the hours required by clients is vital: ‘Customers expect us to be open when they want to call us, not Monday to Friday, nine to five.’

With working arrangements including part-time, job-share arrangements, homeworking, term-time working and a range of different shift patterns, Loop try to be adaptable to the needs of their workforce, as well as those of the business.

The kind of flexibility they operate is a major feature in the proposition they offer prospective clients. Rather than a ‘pile ‘em high, sell ‘em cheap’ philosophy, Loop argue that how you treat people and customer service go hand in hand: ‘People who are happy in work are able to offer better-quality service.’

Loop currently hold the National Customer Services Awards Best Contact Centre award, and the quality of their customer services was noted when Yorkshire Water won the title of Best UK Utility 2004.

Peri Thomas, Loop

Britannia Building Society: flexibility in the context of diversity and corporate strategy

Britannia’s Mutual Preferences makes available the opportunity to request flexible working arrangements to all employees, not just those covered by flexible working legislation. Britannia have taken care to position flexible working as not just ‘for women’ or ‘for people with children’ but for people with busy lives.

Mutual Preferences directly links their commitment to make their business a ‘great place to work, grow and develop’. This is one of the ‘givens’ in the corporate strategy (see model below). Diversity (including the Mutual Preferences scheme) is a cornerstone of this element of the strategy.

Mission:
To be known as Britain’s best mutual

Values and givens
Putting our customers first | Great place to work, grow and develop | Ethical, socially responsible and a model of compliance | Being easy to do business with

Measures

<table>
<thead>
<tr>
<th>Customer satisfaction</th>
<th>Employee satisfaction</th>
<th>Media coverage</th>
<th>Finance</th>
</tr>
</thead>
<tbody>
<tr>
<td>Member satisfaction level</td>
<td>Core members</td>
<td>Total number of members</td>
<td>Employee satisfaction</td>
</tr>
</tbody>
</table>

Current business issues that diversity plans support

Customer experience
- Acquiring new customers
- Selling more to customers we have
- Providing excellent customer service to all our customers

Corporate social responsibility
Being known as Britain’s best mutual through:
- Being ethical, socially responsible
- Model of compliance
- Putting our customers first

Great place to work, grow and develop
- Employee retention
- Attracting new employees
- Improving the satisfaction levels of existing employees
For Centrica, flexibility initially took the form of Project Martini – with the slogan ‘any time, any place, anywhere’. It was an initiative to identify the opportunities for the company to improve the versatility of its employees and the utilisation of its office space. The aim was for ‘Centrica employees to be able to work in the location that best suits the needs of their job, and their preferred working style. Many will have the flexibility to work from all offices, their home and remotely’, thus reducing their reliance on a permanent desk. The focus was on the headquarters and corporate buildings for four brands/business units within Centrica.

Key drivers for the project included:

- the low utilisation of current offices
- the fact that the company’s IT infrastructure is now more mobile and technical solutions are well developed
- the realisation that over the last two decades the way we work has changed from an individual to a collaborative approach, but that office design principles haven’t changed accordingly
- the need to introduce new ways of attracting and keeping employees.

The project was also linked to improving employee engagement and work–life balance (employees were telling them this was something they wanted). The size of the available employment pool would be increased by making Centrica attractive to a more diverse set of candidates.

Teresa Kavanagh and Carol Thwaites, Centrica
The Scottish Legal Aid Board's work–life balance project commenced against a challenging corporate backdrop in September 2001. There was a new senior team, the chief executive was emphasising the need to find ways of working that would help move the Board towards extended service delivery, and there were moves towards an e-business environment.

At the same time, the Board was primarily composed of full-time workers. While there was a flexi system, it relied on swiping in and out of the building using a ‘flexiclock’ and created excessive administration and policing (with Personnel spending their time manually updating records and producing printouts).

Although employees liked the flexitime concept, there was some disgruntlement with the ‘rules’ of the system. In addition, the system was not meeting the changing needs of the business.

The Board’s work–life balance project emerged in this context – and was given added impetus by the end of the flexiclock’s contract and the receipt of a grant from the DTI’s Challenge Fund.

Objectives for the project were to:

• Improve the quality and efficiency of operations by helping to build a culture of flexibility and creativity.

• Increase customer focus.

• Put the Board in a better position to take advantage of new technologies to deliver e-commerce between the Board and the legal profession, in line with Government targets.

• Improve the quality of life and well-being of all staff.

• Improve the morale of staff with consequent improvements to sickness absence rates and employee satisfaction/commitment.

• Raise the Board’s profile as an employer of choice.

While the Board was driven by a combination of employer- and employee-focused objectives, they made clear from the outset that the ‘business needs of the Board and all its clients are paramount’, according to the Work–Life Balance principles they established [see p33].

Moira Williamson, Scottish Legal Aid Board
At Ernst & Young, everyone can request a flexible work arrangement, not just those groups covered by the flexible working legislation. This means that all people, not just parents, can work flexibly if they desire and the firm approves. They could, for example, pursue some kind of personal development. The firm has many examples of people at all levels working flexibly. There is a senior employee who works full time during the winter months – her busy workload season – and takes the summer off to spend time with her family. Another employee takes the ski season off each year to ‘take to the slopes’.

The options highlighted in the firm’s flexible working policy include:

- reduced hours
- working from home
- part-time working
- flexible work times and ad hoc time off
- job-share
- annualised days working
- term-time working
- working beyond the normal retirement age.

Ernst & Young is also keen to emphasise that flexible working isn’t just about being on one of the formally identified flexible working ‘programmes’ in the policy. There are also informal arrangements that do not exactly fit the policies – what is important is the trust between managers and their people about their working arrangements and the fact that they are aligned with client or wider business needs.

Matthew Thomas and Kathryn Hawkey, Ernst & Young
Part 3 The challenge of implementation

‘For an organisation like Britannia it’s easy to say that we want to be a great place to work, grow and develop. The harder part is actually doing it...’ Karen Moir, Director of Organisational Development, Introduction to Mutual Preferences booklet for employees

According to CIPD survey research, flexible working arrangements of some description are widespread in UK organisations. However, making them work effectively in practice represents a significant challenge.

The top six constraints on implementing flexible working emerging from the CIPD survey research are shown in Figure 3.

All of these factors ranked above financial restraints, technological constraints, employee lack of interest and employee resistance, which were perceived as less problematic.

Almost half of the participants in the CIPD survey said that line managers report difficulties in implementing flexible working practices.

The following factors are the ones most likely to cause problems for line managers:

• having to demonstrate fairness between different employees
• problems communicating with their team
• inability to control workflow
• the need to recruit more workers to maintain service/output.

Figure 3: Main constraints on implementing flexible working practices (mean scores)

![Graph showing the main constraints on implementing flexible working practices](image)

‘Not important’

Base: 556

The survey also showed that many organisations, both in the public and the private sectors, are battling to raise awareness of flexible working arrangements so that they can promote take-up across the different groups of workers they employ.

A similar picture of some of the practical challenges of implementing flexible working emerges from the research carried out for this guide.

The following parts of the guide will provide insight into some of the different ways organisations are approaching those challenges. It highlights six areas that it’s important to consider when creating the conditions in which flexible working arrangements can operate most effectively.

These areas are:

- roles and responsibilities
- management skills and attitudes and the organisation culture
- communicating and engaging
- piloting and trialling flexible working arrangements
- monitoring, measuring and evaluating
- maintaining momentum.
Part 4 Roles and responsibilities

‘I think one of the best ways to sum up the benefits of flexible working is that if you’re flexible with your staff, they will be flexible with you.’ Mike Newell, Facilities Manager, Oxford Brookes University

‘There’s been so much PR on flexibility from an individual’s point of view... it’s important people see flexibility from the organisation’s point of view as well. It’s about “give and take” – not just the individual getting what they want.’ Lynette Beckett, Change Manager – Group People Performance, Britannia Building Society

For flexible working arrangements to operate successfully, an accessible and transparent process for managing flexible working requests is needed. This helps employees to feel that they are being treated fairly and that there is a consistent and objective means of assessing requests for alternative working arrangements.

It’s also important that there are clear roles and responsibilities for the various parties involved in making flexible working operate effectively, for example:

- employees (and teams)
- managers
- HR.

This part of the guide considers both the process for managing flexible working, and the roles and responsibilities of those involved.

The process

Many of the organisations in the CIPD study make use of the process and documentation required under the Employment Act 2002 – not just for ‘statutory’ requests for flexible working, but for all employees in their organisation to whom they have extended the right.

The procedure, in line with current legislative requirements, is shown on the opposite page and is available to download from the TIGER website. Also available from the DTI website are template forms and letters for each stage of the procedure.

Some organisations have adopted a two-pronged approach, with requests from those employees not covered by the ‘right to request’ legislation dealt with on a more informal basis. What emerged as particularly important in these circumstances was the need for managers clearly to understand the nature of each flexible working request they were dealing with. The employer could be vulnerable to employment tribunal claims from employees if timelines and the procedure adopted were inappropriate.

Where the procedure outlined by the DTI is more broadly applied, it does have the advantage of encouraging:

- managers to deal with requests in a timely manner
- employees to think through the effect their request will have on their colleagues and the business
- managers to give due consideration to flexible working requests.

The CIPD survey highlighted the fact that many flexible working arrangements are, in practice, dealt with on an informal basis. Research for this guide indicated that many managers with a ‘common sense’ approach had
The procedure for handling statutory requests for flexible working

An application for flexible working is received.

- **Within 28 days**
- **Within 14 days**

You must arrange a meeting with your employee to discuss the application.

- **Within 14 days**

You must write to your employee to provide formal notice of your decision.

- **Within 14 days**

Your employee has a right to appeal. If they decide to do so, they must appeal in writing within 14 days of receiving your formal notice that their application has been rejected.

- **Within 14 days**

You must meet your employee to discuss the appeal.

- **Within 14 days**

You must write to your employee to provide formal notice of your decision about the appeal.

- **Within 14 days**

You must write to your employee to provide formal notice of your decision about the appeal.

Both you are your employee will need to consider what arrangements need to be made for when the new working pattern is to take effect.

Both you and your employee will need to consider what arrangements need to be made for when the new working pattern is to take effect.

Source: TIGER Website (Tailored Interactive Guidance on Employers Rights) www.tiger.gov.uk

been successfully agreeing working patterns and occasional homeworking with their teams before legislation existed in this area.

An informal approach has the potential benefit of promoting dialogue and trust between individuals and their line manager, building employee commitment and ease. In small organisations, it may be more appropriate to use an ad hoc approach of this kind rather than creating an overly formal process. In larger organisations, it’s possible a more informal approach could be used in conjunction with a more formal policy (see Ernst & Young, p15).

However, there is a risk of inconsistencies in managers’ approaches and attitudes to flexible working creating discontent among employees in different parts of the organisation. For an organisation seeking to promote flexible ways of working, it will also be difficult to monitor take-up and measure the effect on performance of flexible working (see Part 8: Monitoring, measuring and evaluating).
It’s also necessary to ensure that managers are aware of the requirement for formality and process when handling requests to work flexibly under the Employment Act 2002 (see p19). Treating these requests on a more informal basis means that the employer could be vulnerable to tribunal claims.

An example of one organisation, a homeless charity, and its experience of managing the request process is shown below.

**St Mungo’s: managing the request process**

St Mungo’s is a homeless charity based in London. Executive Director for HR, Facilities and Audit Pete Jeffery describes the street homeless client group they work with as ‘vulnerable people with complex problems’. The work is challenging, and the organisation experiences staff recruitment and retention difficulties. They want to make the packages they offer as open as possible, so as not to deter candidates.

In light of the challenge of keeping their people, requests for flexible working have in the past not been considered as carefully as they might have been. Under pressure to staff housing projects and hostels across London, managers were agreeing requests without really thinking through the consequences for the individual and the business.

One example of this was a request from an operational manager who had been struggling with a lengthy commute and was considering leaving. She wanted to work a compressed week, with five days’ work carried out in four. The request was agreed, but the new working arrangements fairly quickly ran into difficulties, and there was not a thorough examination of the best solution. The compressed work meant her having extremely long and tiring days once additional working hours were added to a lengthy commute. In addition, the team was left ‘one manager light’ for one day of the week – meaning staff supervision was difficult, with a knock-on effect on operational efficiency.

With the new framework they now have in place, this situation is less likely to arise. As part of their application for flexible working, employees are required to:

- articulate their desired working arrangements
- explain why they would like them
- specify the proposed implementation date
- consider the impact on colleagues
- consider the impact on their job – potential benefits and potential detriments.

Individuals have to think through these issues before they discuss them with their manager. It is now clearer that putting in a request won’t automatically mean it’s agreed to. Managers understand the employee’s need to have an explanation when a request is declined. Having a clear procedure for when decisions are communicated has helped to ‘take the emotion out of the process’ and ensure that operational considerations are balanced with employees’ preferred working arrangements.

Pete Jeffery, St Mungo’s
Roles and responsibilities
The CIPD’s recent research with the University of Bath into the link between people management and performance has highlighted the vital role of front-line managers in bringing HR policies to life. Regardless of an organisation’s policy regarding flexible working, the biggest impact on the individual employee’s experience will be their line manager and their attitude and approach.

Table 3 sets out the potential responsibilities of the various players involved in flexible working. It indicates the kind of role a manager could be expected to play in relation to flexible working. It also suggests the need for individual employees to consider seriously their responsibilities with regard to flexible working: a need for a considered and responsible approach rather than an assumption that flexible working is a right. Table 3 also includes an indication of the kind of facilitating and enabling role that HR teams should be taking in the process.

While the exact nature of the roles and responsibilities will vary depending on the organisation, what emerged from our study is the need for the desired roles to be clearly defined and communicated – and for adequate information, and support, to be available to each party to enable them to play their part effectively.

This process can be seen in action in the next three case studies from the Britannia Building Society, Ernst & Young and the Scottish Legal Aid Board. The Scottish Legal Aid Board highlights the way a deliberately team-based approach can be used to help ensure effective implementation. A further example of a team-based approach took place at Centrica (for further details see p42).

The final case study in this part, from the DSTL, considers the role of a trade union in relation to flexible working. Although not all organisations have a union presence, this case study can also be used to provide an indication of how an organisation might involve and consult with a staff forum.

<table>
<thead>
<tr>
<th>Responsibilities</th>
<th>Employees</th>
<th>Managers</th>
<th>HR</th>
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</thead>
<tbody>
<tr>
<td></td>
<td>• To think through the implications of requesting flexible working arrangements for themselves, their colleagues and the business</td>
<td>• To ensure their team are aware of flexible working opportunities</td>
<td>• To communicate effectively the organisation’s approach to flexible working to all employees and raise awareness of the business benefits</td>
</tr>
<tr>
<td></td>
<td>• To consider how potential negative effects can be overcome</td>
<td>• To consider requests for flexible working reasonably and to ‘own’ the decision</td>
<td>• To help ensure compliance with relevant legislation (Employment Act, equality and discrimination legislation)</td>
</tr>
<tr>
<td></td>
<td>• Consider how flexible they can be with their request: is there a compromise that could help protect the business?</td>
<td>• To ensure the needs of the business are protected</td>
<td>• To offer support and coaching to line managers dealing with flexible working requests</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• To look for opportunities for customers/the business to benefit from individuals working more flexibly</td>
<td>• To promote consistency in the way requests are managed</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• To provide feedback and justification when they are currently unable to accommodate a request for flexible working</td>
<td>• To ensure managers are capable of managing more flexible teams</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>• To ensure flexible workers are not penalised in terms of rewards, learning and development, and promotion opportunities</td>
</tr>
</tbody>
</table>
## Britannia Building Society: communicating roles and responsibilities

The Britannia Building Society’s intranet site for employees contains a range of material for employees and managers to use in the process of requesting and considering requests for flexible working.

The information below is provided so that employees are given consistent advice on the things they need to do in advance of making the request.

### Employee’s preparation (for request)

- Consider the working pattern needed. This can be a change to hours, time of work, days of work or place of work.
- Take responsibility for considering the impact of the change on the branch/department. Think through any advantages/disadvantages – you must state these and any solutions you can think of. An application will not be considered without this evaluation.
- Consider any personal financial implications. Make sure you do not request anything you will be unable to accept.
- Consider if you can be flexible with your request, if you can compromise in some way, which may help the business’s requirements as well.

The intranet site also provides information on the responsibilities that managers have when dealing with requests for flexible working arrangements within the Mutual Preferences framework.

### Managers

- Give serious consideration to all requests to change working patterns.

### Considerations to include:

- Will the changed pattern enable the individual to perform better as their work/life is better balanced?
- Additional costs that may be incurred – what is the impact?
- Is there likely to be a detrimental effect on the ability to meet customer demand?
- Can work be reorganised among other employees?
- Is it possible to recruit extra resources to fill any gap?
- Is there likely to be a detrimental impact on quality or performance?
- Is there enough work during the days/time requested?
- Are there any planned structural changes that may impact on this request?

- Adhere to the process where the request is from a parent with a child under the age of six (or under eighteen if the child is disabled), who requires the change in order to care for the child.

- Carefully consider any requests for the employee to be accompanied at the meeting to discuss the proposed working pattern.

- Seek views of manager/colleagues where unsure. Consider the challenge to your team for more complicated requests.

- Deal with requests in a timely manner, keeping employees advised of progress, the outcome and the rationale.

- Implement any agreed changes, including a contractual change where this is necessary.
At Ernst & Young, a dedicated HR intranet, ‘EY People Space’, is the first port of call for anyone interested in working flexibly. It supplies information, forms and frequently asked questions. People can directly raise any workplace questions anonymously with the Chairman, Nick Land, via ‘Ask Nick’, a feature on the intranet where questions and answers are published.

Flexible working is also promoted as part of the induction process from day one. The firm is keen to create an adult-to-adult relationship with its employees, who are trusted to act responsibly.

It is the ‘Counselling Managers’ who are crucial to making flexible working work at Ernst & Young. These people are generally line managers with specific people management responsibilities. People who are newly promoted to the Counselling Manager role participate in a two-day training course. They spend time on key areas of people management and employment risk – including flexible working – to help raise awareness.

Responsibility for making flexible working work lies very much with the manager – HR normally becoming involved only where there is an issue or concern raised. Requests will usually be accepted unless there is an operational reason it cannot be accommodated. Sometimes a trial period is put in place to see whether the arrangement will work. If managers require additional support, this is available via the HR Shared Service Centre.

Matthew Thomas and Kathryn Hawkey, Ernst & Young
Flexible working

With the national credit services centre in Birmingham, and with a very diverse workforce, Telewest Credit Services has always been keen to aid flexibility when it comes to its people’s shifts and working arrangements. For example, with festivals such as Eid and Ramadan, it would support requests to ensure its people have a suitable work pattern.

During 2004, Telewest’s Credit Services contact centre received in excess of 300 requests to change working patterns and was able to meet around 80 per cent of them. Anne Curran, Senior Contact Centre Manager, explains that this flexible approach pre-dates the introduction of the statutory right to request flexible working in 2003. She says that, although ‘we can’t say yes to everything, we will if we can.’

Surinder Gill, HR Manager, expands on this, explaining that it is ‘a very practical thing to do’. In a challenging and competitive employment market, ‘we would like to be an employer of choice in Birmingham. If we don’t treat our people this way, someone else will.’ With high staff turnover a perennial challenge in call centres, and a range of other businesses operating call centres in the Birmingham and Coventry area, attracting and retaining people are crucial.

The role of the Performance Manager

Employees in the contact centre at Telewest can request to change their working arrangements permanently or temporarily – irrespective of whether or not they are covered by the statutory right to request. The majority of requests fall outside the current scope of the legislation: for example, students seeking to match their working hours with their study requirements and parents of older children balancing work and childcare commitments.

The centre’s Performance Manager plays a central role in managing these requests. This individual plans all resources for the centre in line with operational requirements. All requests have to be considered in the context of the data collected by the centre about predicted call volumes. It’s vital that there are enough people on the phones – and that they are there at the optimum time of day. For example, when following up bills requiring payment, evening cover (when contact centre employees can catch the customer at home) is very important.

Employees seeking a change draft an email to the Performance Manager. They then examine call volumes and other team member holidays to see if the request can be accommodated. Feedback is then provided to the employee (and copied to their line manager) as to whether the request can or cannot be accommodated, along with the reasons for this. If there is an operational impact that requires managing, this is flagged to the credit service manager. If a request for a change cannot be fully accommodated immediately, then the Performance Manager will try to look for a compromise. If the request can’t be met immediately, then a queue system operates where requests will be reconsidered as additional team members join and more flexibility is available.

This is a very structured approach, and Telewest has a large amount of data around its resourcing requirements against its business requirements (ie managing the centre’s call volumes). Having more information ‘gives greater efficiencies which allows greater flexibility’.
The role of HR

In Telewest, line managers ‘manage their teams’, and HR ‘supports, coaches, guides and challenges managers, rather than making decisions for them’. Surinder also describes HR’s role as bringing a ‘message of consistency through the business’.

Where employees are covered by the legislation in this area, line managers are provided with additional support and coaching from HR in order to ensure compliance with the DTI guidelines and required timelines. In terms of decision-making, a member of the HR team will work with the manager to make sure all alternative solutions are taken into account, and to challenge managers about their assumptions. The decision is very much the line manager’s. However, HR ensures that it is has been ‘worked though’ and very well considered.

Accommodating 100 per cent of flexible working requests will always be a challenge. In the Credit Services contact centre, they do their best to offer a working pattern that both meets operational requirements at the optimum times and accommodates employees’ work-life commitments.

Surinder Gill and Anne Curran, Telewest
Steven Carrie, Senior Accounts Specialist, Scottish Legal Aid Board, considers flexible working to be a ‘fairly diverse concept’. He describes how at the Board there has been a ‘hands-off approach’ – with ‘teams and managers developing their own flexible working approach’. They were provided with a range of flexible working patterns (for example, compressed hours/extended flexitime, and regular and occasional homeworking) and left to develop and maintain their own system that met each team’s requirements. In order to monitor progress, three measurement criteria related to their team’s work would also be chosen and monitored by the team [see p50].

Steven heads a team of five people: ‘I took a step back and let the team draw up the guidelines (for the team’s flexible working arrangements).’ Initially he was ‘slightly apprehensive’ – as managers were encouraged to let the team take the initiative. His main concern was regarding staff time – with the team measuring their own working hours (with the ‘old flexiclock’ no longer in operation). However, this changed when he was able to see improvements in output against his team’s targets. They were already carefully monitoring output rates and were able to see improvements in productivity, backlog levels and the improved levels of service they were able to deliver (for example, by extending the number of hours the team were able to deal with telephone queries). At this point, staff kept their own time sheets, and Steven saw them on a weekly basis. Now they use the team-based planning and time-capture system.

‘The most challenging thing initially was work being “sprung” at the last minute – balancing work–life balance and business needs.’ The Scottish Executive, for example, sometimes needed work turned around very quickly. With this in mind, the team decided that the compressed four-day working week, which one member of the team was trying, was not going to work. Since then, ‘there hasn’t been a problem.’

Steven had anticipated that ‘staff would benefit more than the business’ from the new working arrangements and has been surprised to find that in fact it has been in ‘equal measure’. Productivity has increased, along with improved staff morale and greater ownership by the team for planning their work. Individuals have benefited from reduced travel time and costs, and they are now better able to work hours that fit with priorities outside work. One member of the team, whose partner also works full time, has been able to organise their working hours so they no longer require childcare arrangements.

There has been plenty of assistance from the HR team. In the early days there were team meetings or ‘surgeries’, and individual meetings if needed, encouraging managers to ‘let go’. The Board also worked with an external consultant who was able to share experiences from other organisations. There were also regular briefings from HR, who were always on hand to assist in the initial stages, and managers were encouraged to report back to them frequently on progress.

Steven also comments how well HR communicated in the project, letting people know ‘where we are in the process, what’s happening next’. He says HR were also good at giving examples of what could work when it came to flexible working.

Steven Carrie, Scottish Legal Aid Board
DSTL: dialogue with the union

At the DSTL, two unions are represented – PCS and Prospect. When it came to reviewing their flexible working scheme [see p46 and p55], the HR team were keen to involve the unions from day one. As soon as the proposal for the flexible working project was approved, the unions were informally involved. This meant they were part of the project from the start, rather than being involved at the last minute (for example, when it came to effecting changes to employees’ terms and conditions).

One example of where the unions were able to make a useful contribution to the project was when discussing the proposed changes to the flexible working scheme. One of these included a requirement that all accrued flexitime should be used by the end of the financial year. The union raised this as a concern. On examination, it became clear there was no business reason to keep this provision, and it was not included in the final arrangements.

Discussions with the unions also provoked discussion on whether there should be limits to the flexitime that an individual could accrue. In this instance, the union initially argued that there should not be a limit. However, the HR team believed that without some limits on accruing time there could be health and safety and working time implications for employees – and the final working arrangements agreed reflected this belief.

Bijal Parikh, DSTL
Part 5 Management skills and attitudes and the organisation culture

“We have comprehensive policies – the challenge is bringing them to life and making them culturally acceptable. Getting flexible working to work for the individual and the firm.”
Kathryn Hawkey, Ernst & Young

“I am lucky that my line manager strongly believes in work–life balance and encourages me to work flexible hours to suit my other commitments, and this helps reduce stress and improve my performance at work.” Quote from female administrator, Oxford Brookes University audit

“There seems to be a mistrust of the idea of work–life balance with some levels of management – almost a view that staff who are interested in it are somehow trying to take the University for a ride. This attitude needs to be dispelled if work–life balance initiatives are to be successful.” Quote from male academic, Oxford Brookes University audit

In Part 4, this guide has already started to explore the role that managing flexible working demands of frontline managers – and the support (in the form both of processes and advice and coaching) they need in order to be able to manage successfully in a more flexible working environment.

Organisations involved in research for this guide were convinced of the importance of management capability when it came to implementing flexible working effectively. There was a belief this extended beyond the mechanics of performing their role in the flexible working request process to their attitude to flexible working and their ability to manage the broader implications of flexible styles of working. They also emphasised the need for managers to build and operate in a culture that helped rather than hindered efforts to promote flexible working.

Management skills and attitudes
The need for managers to have the ‘will’ as well as the ‘skill’ to manage flexible working effectively emerged from the CIPD research, as illustrated by the comments below:

“It can work for the admin team – but it’s not for managers, it won’t work.”
Manager

“The key thing is management attitudes – the “we need people here, we need to see them working” … the “this is a full-time job” mentality.”
HR manager

Methods that organisations were using to overcome this challenge included:
• educating managers of the business case for flexible working via training sessions

• coaching managers when dealing with flexible working requests to be more open-minded to alternative ways of working

• creating case studies showcasing examples of different employees taking up various flexible working arrangements – and the benefits to the business as well as the individual

• ensuring the active support of senior management in promoting flexible working.

This area is explored in more detail in Part 6: Communicating and engaging.

For the most part, organisations did not feel flexible working required an entirely new skillset – rather, that flexible working placed certain areas of management competence in the spotlight. These included:

• **Performance management**
  Many of the organisations interviewed said flexible working highlighted the need for managers to be capable – and confident – in their ability to manage the performance of their team.

  It was important for managers to change the belief that if you could ‘see’ members of the team, this equated to knowing how they were performing. Objective-setting for individuals, so performance could be measured against their outputs, was an important part of managers still feeling in control of the performance of their team – even if the team members weren’t physically always in the same place at the same time.

• **Communication**
  Managers being able to communicate with their team, and vice versa, is another area given heightened importance in a situation where individuals are working on a more flexible basis. Where people are working remotely – eg from other offices or from home on a regular basis – communication requires more planning in order to ensure that flexible workers are not excluded from important briefings or feel detached from the team.

With this issue in mind, few of the organisations interviewed for this guide had employees who were permanently home-based.

Organisations that had invested time in considering this issue had often established ‘ground rules’ in this area so that individuals working flexibly could be effectively included in communication channels, for example, by:

• scheduling briefings to ensure that team members working evening and weekend shifts were included

• explaining how the email system could be used to communicate members’ whereabouts to their colleagues

• ensuring that, while those working from home remained contactable, they still felt able to leave their desk and take their lunch break ‘guilt-free’

• emphasising the role that regular, face-to-face team meetings still had to play – even in view of the use that could be made of conference-call facilities and videoconferencing.

• **Resource planning**
  Unsurprisingly, a significant number of organisations in the study also mentioned resource planning as an area requiring additional attention when managing a more flexible workforce.

  As one participant described it, ‘Where in the past far more employees might have been working a nine–five day… it was straightforward. But when some people work morning, some afternoons, some split days – how do you programme your business? It’s challenging.’

  Part of the answer appeared to lie with encouraging managers to look beyond the conventional resourcing solutions – to be more innovative in the way they approach their workload planning.

  ‘You might need to be more creative, to get around the quirks,’ advised Helen Gibbs, Senior Personnel Adviser at the London Borough of Sutton.

  Multiskilling was also raised as a potential aid to resource planning:
'We also have lots of multiskilling here. It helps with the resource planning; there’s more freedom to mix people around and people available to do the hours we need,’ explained Peri Thomas from Loop.

It was also suggested that multiskilling had the advantages of helping provide employees with more variety and potential career development opportunities.

Several organisations in the study described the benefits of having a team-based approach to flexible working, with some teams involved in self-rostering.

‘You need to have much more emphasis on teamworking, then they [the teams] will start looking after themselves. It’s better than imposing shifts on them and then they “pull a sicky”. Then you have the resource when you need it.’

Building the organisation culture
More broadly speaking, organisations that took part in the study also raised the issue of organisational culture as being an important part of enabling flexible working to become part of ‘business as usual’.

Areas that are particularly important to consider as part of this bigger picture are:

• Trust
Organisations involved in the research for this guide frequently referred to the increased importance of trust between the individual and their line manager if flexible working arrangements are to operate successfully. A way of working based on policing and control is likely to be time-consuming and bureaucratic. There is a need for performance management to be based on objective measures of output – and for flexibility in how these outputs are achieved.

• Fairness and consistency
Organisations emphasised the importance of a process that was fair and ‘seen to be fair’ (see also Part 4). To help address this, in addition to creating processes and policies for flexible working, some organisations were also seeking to communicate a clear set of principles as the basis for a consistent message about their organisation’s approach to flexible working.

There was a danger referred to that employees would be frustrated when it was assumed that flexible working was acceptable for some groups but ruled out for others – with no objective assessment of the suitability of the role for flexible working and its potential impact on the business.

Frustration was also experienced when it was felt that there was a lack of consistency in line manager attitudes and approaches to flexible working – which undermined employees’ confidence that they were being treated fairly.

• Cultural acceptability
Interviews with organisations for this guide also showed some organisations looking for opportunities to encourage take-up among different groups of employees – not relying, for example, on the assumption it could work only for desk-based or administrative workers.

They were working towards creating an environment that was receptive to different working arrangements, rather than employees fearing that investigating flexible working opportunities could negatively affect their careers or development opportunities, or call their commitment to their work into question.

In this context, the CIPD's 2005 survey also explored what was being done to put to rest employees’ fears of asking for more flexible working arrangements.

The issue of communication was most frequently raised. This is examined in more detail in Part 6 of this guide. The other areas shown in Figure 4 provide an indication of the kind of holistic approach required, ranging from looking at the accessibility of learning and development opportunities, through to considering job descriptions and the recruitment process.
The following case studies explore in practice these issues of:

- management mindset
- management skills
- organisation culture.

In the case of the Scottish Legal Aid Board, managers’ ability to manage their resources effectively in the context of team-based self-rostering is examined. A further example illustrates the guiding principles established for this organisation’s work–life balance project.

The example from the DSTL examines the role of performance management and more trusting relationships between individuals and their managers in making flexible working work.

The final case study in this section, from Ernst & Young, explores the work they are doing to build employees’ awareness of flexible working and to ensure they don’t see pursuing flexible working opportunities as career-limiting.
Moira Williamson, Personnel Manager (Development) at the Scottish Legal Aid Board, describes how managers had taken less responsibility for flexible work–life balance arrangements because in the initial stages they had deliberately been ‘told to stand back’. She says they needed to learn through the pilot stages the relevant roles and accountabilities required at different levels to support flexible working. They now need to work with managers to develop their resource management abilities.

Their latest review at the end of the Work–Life Balance project phase in 2004 confirms team-based rostering as the foundation of their arrangements. However, it recommends the need for a focus on ‘effective resource planning, management and routine review at team and manager level’ to ensure the arrangements don’t end up ‘benefiting a minority of employees – to the detriment of others and the business’. It suggests effective resource management should be a key area of accountability for managers. An annual review by managers is recommended – comparing planned and actual staff resource deployment, and extracting information from the telephone system on call levels and lost calls. Analysis of customer feedback, complaints and internal perceptions of service should also be carried out. This is important, as, in view of changes to the business, the work patterns required to deliver the Board’s objectives will continue to change.

The review also highlights the need at team level for renewed emphasis on planning staff rotas, and at team-leader level for comparing planned and actual resources available. ‘Flexibility cannot mean individuals in teams being allowed to work (or not to work) what they feel like on any particular day.’ This is the one factor that has caused dissatisfaction with flexible working among a minority of staff in teams where strong characters can ‘rule the roost’.

Moira Williamson, Scottish Legal Aid Board
The Board spent time at the beginning of their project to agree a set of ‘work–life balance principles’ that could be used as a common source of reference when it came to implementing flexible working arrangements. The principles included the areas below:

**Shared responsibility and joint problem-solving in teams**
Staff and managers have joint responsibility for identifying work–life balance solutions. Working together and joint problem-solving in teams are fundamental to creating a win–win outcome for the business and for individuals. The key criteria against which work–life balance should be judged are:

- Does it benefit the individual?
- Does it benefit the team?
- Does it improve the Board’s working arrangements?
- Does it benefit the Board’s clients?

**Service delivery**
The business needs of the Board and its clients are paramount.

While every effort will be made to accommodate individual needs, and while all legal obligations will be met, there is no absolute right on the part of any employee to a particular work–life balance solution.

Moira Williamson, Scottish Legal Aid Board
When DSTL revitalised their flexible working arrangements [see p55] they were aiming to remove bureaucracy by creating a culture of trust between managers and their teams.

Managers are encouraged to focus on individual’s outputs, ‘not how long people sit at their desks’. Although hours worked are required to be logged, employees are trusted to manage their time. Managers intervene only when they have reason to believe that their trust is not being reciprocated.

‘The main hurdle’, says Bijal Parikh, HR Manager, ‘is managers feeling they are going to lose control’ – ‘once you get over that one, it’s a lot easier.’

It is mindset rather than particular management skills which Bijal believes is particularly important. Managers are also responding to the changes in the social context. They appreciate that men and women both aspire to have fulfilling careers and that this requires a more open mindset for those who have management responsibility in the workplace. Managers are objectively assessing requests for flexible working rather than being judgemental and influenced by their own personal value set. This is shown by the fact that over one-third of DSTL part-time workers are men.

Bijal Parikh, DSTL
Kathryn Hawkey, Ernst & Young, says ‘we have comprehensive policies – the challenge is bringing them to life and making them culturally acceptable. Getting flexible working to work for the individual and the firm.’

‘It’s our line managers who have to make our flexible working arrangements work in practice: they are the ones who can find it hard. Senior management agrees on the need for more flexible working and our people want it… The challenge we have is getting managers to embrace flexible working, rather than see it as a concession.’

Ernst & Young is making every effort to encourage the take-up of the flexible working option in suitable circumstances. It is particularly keen to raise awareness and perceived acceptability of flexible working arrangements at all levels and within all parts of the business.

With this in mind, the HR team at Ernst & Young are working to dispel the idea that taking up flexible working may be in some way career-limiting. The firm is focusing on sharing success stories of where flexible working is working effectively, and it is showcasing flexible working case studies on the firm’s intranet to create role models and get some dialogue in the business.

A number of the firm’s staff members have taken up an option to work reduced hours. This benefit was initially designed for mothers returning from maternity leave. It allows the employee to reduce their hours by ten hours a week and still receive full-time equivalent pension, private medical insurance and car allowance. This benefit is available for a limited period of five years, or two periods of three years – and has now been extended to those with other caring responsibilities.

Matthew Thomas and Kathryn Hawkey, Ernst & Young
Part 6 Communicating and engaging

‘The Chief Executive and senior management were right behind our project – he would mention it in every one of his communications.’ Bijal Parikh, HR Manager, DSTL

‘Of course parents have additional rights under the legislation. But we’ve never emphasised this. If we do, it creates a divided workforce… No one here tries to “play the parent card”. For us it’s about equality of access.’ Moira Williamson, Scottish Legal Aid Board

Communicating the opportunities and the potential benefits of flexible working is an area that organisations need to plan from the outset. Creating the policy is only the first step when it comes to making flexible working a reality.

In Parts 4 and 5, this guide considered the vital role that line managers have to play in bringing flexible working policies to life. Part 5 also examined the importance of ‘getting the culture right’ when it comes to creating the conditions for flexible working to work effectively.

The CIPD’s latest survey demonstrated that the majority of organisations needed to improve awareness of flexible working arrangements (see Figure 5). Only 14 per cent of survey respondents believed their people were already ‘very aware’ of flexible working opportunities.

A number of the organisations in our study mentioned how helpful it had been to involve senior management in their communications relating to flexible working – as high-profile ‘champions’. As Bijal Parikh’s comment above suggests, this was extremely helpful to DSTL when it came to revitalising their flexischeme.

Several of the organisations we spoke to were working to change the perception that flexible working was something that existed in particular for women with childcare responsibilities and for parents. Indeed, this is reflected in terms of current patterns of take-up.

Figure 5: Awareness of existing flexible working arrangements (%)

<table>
<thead>
<tr>
<th></th>
<th>1 ‘Not aware at all’</th>
<th>2</th>
<th>3</th>
<th>4</th>
<th>5 ‘Very aware’</th>
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<tr>
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<td></td>
<td></td>
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<td></td>
<td>4</td>
<td>14</td>
<td>33</td>
<td>35</td>
<td>14</td>
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</tbody>
</table>

Base: 578
Flexible Working and Paternity Leave: The full rate for fatherhood indicated that 29 per cent of women had at some point asked their employer for more flexible working arrangements, as opposed to 19 per cent of men. Meeting childcare responsibilities was found to be the most common reason for asking for flexible working arrangements (see further details in Figure 6).

The following case studies highlight the role that communication and engagement have in successfully implementing – and embedding – flexible working arrangements.

In the case of the Britannia Building Society, we consider their efforts to promote ‘Mutual Preferences’ – making the right to request available to all employees. Two examples from the booklet they used as part of their awareness-raising campaign are included – one from a working father and one from a female senior manager.

The next example is from Oxford Brookes. As part of their efforts to build flexible working, they also produced A Guide to Work-Life Balance. We see here an extract containing a manager’s perceptions of flexible working and its effect on the team.

The final example of communication and engagement in practice is from Centrica, who were rolling out ‘work:wise’, their flexible working scheme, following a successful pilot exercise (see p44). Their approach was to create a step-by-step ‘engagement process’, from the initial awareness-raising stage for employees affected in the next phase of the flexible working project, through to coaching for managers, addressing team issues and effecting changes to working arrangements.
Britannia originally launched their ‘Preferences’ programme in 2003, coinciding with the legislative ‘right to request’ coming into effect as a result of the Employment Act 2002. They decided they wanted to extend the right to request so that all employees could apply – not just parents. They then also started measuring on a quarterly basis how many requests were received, and the numbers accepted or rejected.

However, the numbers requesting alternative working arrangements were low, and while the employee survey, Viewpoint, showed high levels of staff satisfaction generally, people were voicing concerns about work–life balance. As a result, a number of focus groups were set up. These revealed:

- People were unaware of the options available – ‘We don’t know about these things.’
- There was a perception that the new scheme ‘was all about parents of smaller children’ or that their ‘manager doesn’t understand’.

As a consequence, after 18 months, the scheme was updated, retitled (as Mutual Preferences) and relaunched. A personal copy of the booklet was delivered to every desk, containing the range of options available and case-study examples of a variety of employees working flexibly from different parts of the organisation [see the extracts on pp39 and 40]. Information about the scheme has also been built into the induction programme. In addition, more information for both managers and employees about their role and responsibilities within the framework is now available via the intranet [see p22]

Ian McFaul and Lynnette Beckett, Britannia Building Society
Some men might feel uncomfortable about taking anything above the minimum parental leave.

For Richard Thorne there was no choice.

As a single parent treading the work–life balance tightrope more carefully than most, he saw an opportunity to take some unpaid parental leave last year and grabbed it with both hands.

‘My boy James was starting school – which is obviously one of the biggest and scariest things any of us experience, but also a real watershed moment as a parent,’ says Richard. ‘I just wanted to be there at the school gates for him in those first few weeks.’

Richard, a marketing information manager, lives 45 minutes from Leek and admits that without this leave – which totalled five weeks – it would have been impossible to spend that special time with his son.

‘I first discovered the parental leave when browsing Britnet [the company’s intranet],’ he recalls. ‘I followed the link, read the information, applied for the leave and got it. All very simple!’

An added bonus was that Richard had moved into a new house at the time of his parental leave, which allowed time to get settled in and troubleshoot one or two unexpected problems.

Nevertheless, the pressures on parents with dependent children remains unrelenting, he says. ‘The biggest issue is managing the day-to-day childcare. I negotiated one late start and one early finish per week to do the nursery run, which left my wife to do it eight times! It got to the point where her employers took disciplinary action for poor timekeeping. But what choice did we have?’

Richard now works flexible hours. And it has made a huge difference. ‘We need to get rid of this culture of needing to be seen at your desk from 9 to 5 – and thankfully that’s now starting to happen.’

Extract from *Mutual Preferences: Work–life balance in the Britannia Group*
There’s a general rule of thumb that senior managers are expected to put in more hours than everyone else.

Of course it shouldn’t be that way – but in a fiercely competitive and overcrowded industry like financial services, there’s often little choice.

Debbie Smith, however, is one of a new breed of manager who is proving that you don’t need to work insane hours to run a happy – and successful – ship.

As a strategy manager with wide-ranging operational responsibilities from end-to-end mortgage and insurance processing to remortgaging conveyancing, Debbie works a compressed four-day work in Leek, spending Fridays at home in Wolverhampton.

‘I tend to work from 7am until around 5pm. It suits me for all sorts of reasons. For a start it’s a much quicker commute in the morning, but most importantly I get to spend quality time with my family in the evenings and over the extended weekend.’

Her previous role for a large financial services company was a very different story. ‘It was the type of culture where if you left at 5 o’clock people would be frowning – and not in a humorous way!’

Debbie, who joined the Group last year, has had no such problems at Britannia. ‘I can honestly say that I have never, ever felt under any pressure from anybody to change my work–life balance.’

She does, however, admit that flexibility is a two-way street. ‘If I’m needed in the office on a Friday, or if anyone needs to talk to me at home, there’s absolutely no problem.

‘I’m also happy for colleagues to have meetings without me! In fact one really positive effect from my four-day week is that people have been given the chance to take on more responsibility, which in turn really motivates the team.’

Extract from Mutual Preferences: Work—life balance in the Britannia Group
Mike Newell is Facilities Manager at Oxford Brookes University. He is a strong supporter of flexible working and says, ‘I think one of the best ways to sum up the benefits of flexible working is that if you’re flexible with your staff, they will be flexible with you.’

Mike allows his staff time to attend their children’s school events in working hours, with an agreement to make up the time lost. Additional working time is particularly useful for the department at busy periods, for example during the first couple of weeks of a semester. Another example is that staff may take a shorter lunch break for a period and ‘clock up’ time to go Christmas shopping.

Mike recognises the importance of building up good working relationships and supporting staff to balance their home life and work life. He commented that, ‘If staff aren’t supported and don’t get the balance right, then they can be less inclined to do things when they are at work.’ He is sure that offering staff flexibility improves recruitment and retention and says, ‘I know of staff who have come here from other organisations and have been surprised at the flexibility we offer.’

Extract from A Guide to Work–Life Balance and Good Practice at Oxford Brookes University
Centrica: creating an engagement process

Roadshows
Centrica carried out a series of engagement roadshows to raise awareness around the workplace about ‘work:wise’, its flexible working scheme. Their purpose was to describe the concept of work:wise and its objectives [see p44], to explain the different identified worker types (office, mobile and home-based workers) and to outline what happens next as part of the work:wise journey.

Manager workshops
All managers involved in the work:wise programme attend a half-day workshop that takes a coaching approach to helping them feel confident about running a team when they are working remotely or differently as a result of work:wise.

Teambuilding workshops
Managers and their teams take part in a one-day facilitated workshop to explore the implications of new ways of working. This includes creating a ‘team vision’: considering what their ‘10 out of 10 team’ would be like in terms of delivering to customers and clients. The day also involves teams considering their own roles and how they might suit flexible ways of working. Individuals are asked to consider their own preferences when it comes to work, and the Strength Deployment Inventory, a psychometric tool, is used to help in this process. The team considers any potential areas of difficulty and conflict that could result from the team working more flexibly.

The end product from the teambuilding day is a unique ‘Team Charter’ that contains the agreed rules and boundaries that will define how they will work together and communicate.

The teambuilding workshop is then followed by a one-to-one consultation between the manager and individual members of the team to decide together their worker profile. This will take into account:

- the individual’s preferences
- their role
- the team they operate in.

Technical training
Where appropriate, individuals are then supplied with mobile equipment eg a laptop with wireless connection, a mobile phone and a home broadband link. To ensure that health and safety considerations are not overlooked, Centrica will not issue such equipment until their people have received Health and Safety Executive guidance and been shown a bespoke flexible working film.

Teresa Kavanagh and Carol Thwaites, Centrica
Part 7 Piloting and trialling flexible working arrangements

‘If you want to try something completely different, call it a pilot, give it a try, measure it, see how it works.’ Moira Williamson, Scottish Legal Aid Board

‘We ideally build in reviews to new flexible working arrangements... It helps to build good management practice.’ Helen Gibbs, Senior Personnel Adviser, London Borough of Sutton

When introducing new ways of working, pilots and trials have a valuable role to play. The organisations interviewed for this guide frequently referred to the benefits of:

- piloting more flexible ways of working (eg with limited numbers of people in a particular area of the business) as part of the implementation process for a larger-scale project

- using trial periods, and regular reviews, to improve the implementation of flexible working at an individual level.

The value of the pilot process
The following three case study examples demonstrate the part that piloting played in building the successful application of flexible working at Centrica, Loop and the DSTL. In each case, the pilot enabled the organisation to ‘test’ a proposition with a smaller group of employees and then evaluate the experience to make relevant adjustments, prior to the working arrangements being extended or permanently embedded in the organisation.
Centrica’s pilot project for introducing more flexible ways of working was Project Martini. The impetus for Martini came from an examination of the way office space was being used in the south of England. The company had an outdated building, with 650 seats, which they were considering replacing. The question was: if people were to work differently, could they replace the current building with a smaller one, or would they not need to replace it at all?

In a project co-sponsored by the Group HR Director and the Group Property Director, a number of surveys were carried out to examine how office space was being used across four main sites. Some 550 members of staff then took part over six months in the pilot project, which saw the development of three worker profiles – office, mobile and home-based. These were based on their individual preferences, the needs of their role and the needs of their team.

The business case for the flexible working project was based on the opportunity for:

- potentially significant commercial property savings
- Centrica building its brand as an employer of choice.

One area where the pilot was particularly helpful was in highlighting the support needed for managers. It became clear at a very early stage that many middle managers had concerns about:

- team cohesion
- communication
- how to manage a remote team.

As a result, the company designed a new coaching workshop for managers [see p42]. The former pilot now constitutes the basis of ‘work:wise’ and by October 2005 it will have been extended to 3,000 employees.

Teresa Kavanagh and Carol Thwaites, Centrica
Other contact centres tend to be surprised that Loop are able to operate term-time working in a contact centre environment, especially given that billing rounds for the companies they work for can hit at Easter or half-term.

Term-time working was something team members had been asking for at Loop.

The company prizes a people-oriented culture as an important part of the quality proposition they offer their clients [see p12]. So their approach was to involve employees interested in term-time working in scoping the project and examining whether it was manageable in terms of maintaining service levels and managing call volumes.

A small number of employees (three) were then involved in a pilot exercise to monitor the effects of term-time working on the business and to see whether any issues that had not been anticipated arose.

The pilot demonstrated that Loop were able to offer a proportion of their people term-time working. The pilot enabled them to learn about how many people could be accommodated, how to select staff and how these arrangements would end (eg when children were older and other people with younger children wanted to take their place). As a result, term-time working was permanently introduced for 20 people working in a range of job roles.

For Loop, the solution they have found to managing term-time working has been to limit the number of places available, which enables them to manage the operational implications for the business. Employees apply for a term-time working place, which is then renewed on an annual basis. The trick to making term-time working work has been employees’ commitment: ‘They really want to make it work.’ If they are unable to offer employees a place, the company is flexible where it can be eg offering unpaid leave over the school holidays. Another recent example includes a team manager taking three months’ unpaid leave to be with her partner while he works in Australia.

The benefits of the efforts Loop have made to create a ‘people-oriented culture’ seem to be paying off. The company experiences less employee turnover and less sickness than the industry average. They have also received external recognition both within the call centre industry and appearing in the *Sunday Times* Top 100 Best Companies to Work For listing three years running. Loop were also successful in winning the Top 100 Award for Best Home–Work Balance, a particular achievement for an operation open long hours, seven days a week, which needs flexible resourcing to deal with peak workloads at short notice.

Peri Thomas, Loop
Flexible working

Trialling and reviewing flexible working arrangements

Many of the organisations we spoke to also highlighted the benefits of trialling flexible working in the first instance, before they became more permanently established – and regularly reviewing them once they were in place.

Some of the advantages suggested included:

- the opportunity for individuals to try out the new way of working (for example, to see how they would cope with the long days which facilitated a compressed working week)

- the fact that it helped with reviewing the resource requirements of the team (i.e., it had caused resentment when individuals were able to continue with term-time working arrangements once their children had left school).

- the fact that it helped identify potential problems regarding team communication and performance management before the arrangements were finalised.

- the fact that it helped encourage managers and employees thoroughly to think through the implications of the new working arrangements in advance.

The case study below provides an example of the recommendations made by Rotherham Metropolitan Borough Council.

DSTL: piloting flexible working arrangements

The DSTL were in the process of altering their flexible working scheme and opted to carry out pilots for the new arrangements in two departments [see also p34 and p56].

With the move away from core hours, some senior managers were concerned about potential knock-on effects on project deadlines and availability to clients.

The departments trialled the proposals for three months. During this time, the project team kept in close contact with the department to iron out teething problems. (An intranet site was set up which gave a full report on the pilots, but this was part of the communications, not the pilot itself.)

At the end of the three months there was a post-pilot questionnaire for participants which explored whether the new arrangements had affected:

- customer feedback

- team availability

- project deadlines/milestones.

None of these areas was affected by the trial of the new flexible working scheme – and it was extended to the whole organisation. Anecdotal evidence from the pilot project also showed ‘a real buzz about the place’; people felt they ‘weren’t being watched over’.

Bijal Parikh, DSTL
As part of their ‘Striking the balance: improving services, balancing lives’ project, Rotherham Metropolitan Borough Council produced a managers’ guidance document on work–life balance/flexible working.

After a request for flexible working is agreed – and the implications of managing the new pattern have been considered – this guidance highlights the need for:

**Setting a timetable for change**
Whether it is a change to an individual’s or a team’s working patterns, a clear timetable needs to be agreed with those involved. This will involve setting a date to review the new pattern.

**Review of outcomes**
The effect of the new working arrangement should be assessed initially after three months, then at half-yearly or yearly intervals. The review should be conducted with the employee and should take into account the:

- effect on service delivery
- effect on the team/service
- benefits to the individual
- views of the direct users of the service
- support needs of the individual, including supervision, performance development review, training and access to buildings equipment.

It may also reveal benefits or problems not anticipated at the outset.

Rotherham Metropolitan Borough Council
Only a quarter of organisations formally monitor the take-up of flexible working. One-fifth evaluated the effectiveness of one or more of their flexible working practices in the previous year. *Flexible working: impact and implementation* (2005)

The expression ‘if you can’t measure it, you can’t manage it’ is used frequently. The implementation in 2005 of a legal responsibility for companies to report on people in their annual report has raised the profile of metrics relating to people management.

But CIPD research in this area shows that businesses are still grappling with the challenge of effective measurement when it comes to flexible working. Only one-fifth of organisations had evaluated the effectiveness of one or more of their flexible working practices during the previous 12 months.

The factors taken into account by those 124 organisations that did carry out an evaluation of some kind are shown in Figure 7.

Take-up rates were most frequently used as measures as part of the evaluations carried out. While monitoring take-up alone can’t demonstrate the business case, it is an important indication of how embedded flexible working arrangements are in the organisation. It can help project managers or HR teams involved in promoting flexible working to pinpoint areas where awareness may be low or where individuals feel they are not able to take up opportunities to work flexibly.

The next case study describes how one organisation, Ernst & Young, is monitoring the take-up of flexible working arrangements around its business.

Recording the proportion of flexible working requests accepted can also help larger organisations keep track

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**Figure 7: Factors considered in evaluating the effectiveness of flexible working practices (%)**

Base: 124 (organisations that had conducted an evaluation in previous 12 months)

Ernst & Young record and monitor the take-up of flexible working options across the business. The flexible working data is maintained centrally by their HR Shared Service Centre in Birmingham and is populated through the firm’s HR information system, PeopleSoft. This information is then communicated to the firm’s population on the intranet.

Unsurprisingly, take-up of flexible working is higher, as it is in most businesses, among women than men. However, the organisation is working hard to ‘dispel this myth’ and showcase examples of success stories where flexible working works among a diverse range of people [see p35].

Matthew Thomas and Kathryn Hawkey, Ernst & Young

<table>
<thead>
<tr>
<th>Category</th>
<th>Headcount</th>
<th>No. of participants</th>
<th>% age of participants</th>
<th>Gender</th>
<th>Field</th>
<th>Level</th>
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<tbody>
<tr>
<td>Reduced hours</td>
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<td>Part-time</td>
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<td>Career break</td>
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<td>Beyond retirement</td>
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<td>Annualised hours</td>
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<tr>
<td>Unpaid leave</td>
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<tr>
<td>Overall totals</td>
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</table>

Unsurprisingly, take-up of flexible working is higher, as it is in most businesses, among women than men. However, the organisation is working hard to ‘dispel this myth’ and showcase examples of success stories where flexible working works among a diverse range of people [see p35].

of how receptive their organisation is to requests, and help them to identify potential problem areas of the business where flexible working requests don’t appear to be given sufficient consideration.

But in order to demonstrate the business case to managers (who we know are essential in bringing flexible working to life), it’s essential to capture ‘hard’ information relevant to the performance of the organisation.

The kind of measures that could be relevant here include:

• tracking staff turnover rates and the impact of flexible working take-up on them
• overtime costs
• business outputs such as customer satisfaction levels, production levels, error levels
• staff satisfaction levels.

Evaluation of the impact of flexible working can take place on a number of different levels:

• individual employee
• team/department
• business unit
• site
• organisation-wide.

The next case study is from the Scottish Legal Aid Board. It provides an indication of the potential benefits of allowing teams to set their own targets and measures, as well as carrying out evaluation at an organisation-wide level.
Measurement was pushed from the outset in the Scottish Legal Aid Board’s project. It was felt that it was very important to justify to the business what impact the changes were having on the business.

At the outset, the emphasis was on protecting the business – rather than expecting to see a dramatic improvement. It was to be ‘good for the people’ without jeopardising the Board’s work for its clients.

Each team was given a template asking them to record their own team measures for the pilot project under three main categories:

1. **business impact** – these were organisation-wide measures that were also collected at a team level: overtime costs, sickness and employee turnover

2. **customer service** – some operational teams had established performance indicators, others had none. They were encouraged to ask themselves, ‘How does your team know when it is doing a good job?’ and to come up with two or three measures that might be important to the internal or external customer. These could be, for instance, extended service hours, customer satisfaction, quality indicators, backlog depletion etc.

3. **team issues** – specific to the individuals in the team eg mini satisfaction surveys with suggested or the team’s own questions, reduced travel time, travel or childcare costs, improved team communications, increased skills due to cross-training, ad hoc statements of improved quality of life.

Surgeries were held by HR and with an external consultant to look at the team’s initial ‘template’, give advice if necessary and ensure that it was sufficiently robust.

Pre-pilot (benchmark) measures were established, then updates gathered during and at the end of pilot phases. This focused employees on the business and personal benefits required from any arrangements and allowed any cynics to be silenced by the success measures at each stage of the project.

The following measures of progress in the organisation since the introduction of the work–life balance project were provided in the final project review report in 2004 to the organisation’s board. The arrangements were formalised into employee terms and conditions in 2005.
As the table above demonstrates, the Scottish Legal Aid Board's Work–Life Project appears to have succeeded beyond merely ‘protecting the business’. Moira Williamson, Personnel Manager (Development) points out that inevitably it is impossible to highlight flexible working as the only reason for the improvements shown above (other action to improve absence levels has also taken place, for example). However, it seems clear that the prominence of this project in the Board’s activities has contributed to considerable business savings, and to the creation of a more diverse and stable workforce.

Moira Williamson, Scottish Legal Aid Board
Employee opinion or staff attitude surveys were the second most popular way of evaluating flexible working practices, according to the CIPD survey.

Some organisations involved in the research incorporated the evaluation of flexible working into their regular employee opinion survey. Asking the same questions via the staff survey at intervals provides the opportunity for organisations to track changing perceptions and experiences of the organisation in relation to flexible working over a period of time.

The following case study example illustrates the questions that the Scottish Legal Aid Board used in their opinion survey, which was one element in the review process of their work–life balance project.

**Quantitative versus qualitative information**

The organisations involved in research for this guide that had been able to collect quantitative as well as qualitative information relating to their flexible working arrangements felt this information had been particularly valuable in winning or maintaining the support of senior management and helping to win the support of line managers.

A number of organisations in the study had used qualitative methods – such as facilitated focus groups – to evaluate the effectiveness of flexible working.

### Scottish Legal Aid Board: surveying employee opinions

At intervals in their work–life balance project, the Scottish Legal Aid Board also made use of data from an opinion survey to measure progress from an employee perspective. Examples of some of the areas they examined are provided below:

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<thead>
<tr>
<th></th>
<th>Strongly agree</th>
<th>Agree</th>
<th>Disagree</th>
<th>Strongly disagree</th>
<th>Don’t know</th>
<th>N/a</th>
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<tbody>
<tr>
<td>The opportunity for flexible working is important to me</td>
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<td>I feel the Board helps me to create a good balance between my work and life outside work</td>
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<td>I would like more flexibility about where I work</td>
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<td>I would like more flexibility about when I work</td>
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<tr>
<td>My working pattern is tailored to the demands of the service we offer</td>
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<tr>
<td>I could work more effectively if I had more flexible working patterns</td>
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<tr>
<td>I think my line manager supports the concept of work–life balance</td>
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Their experience was that, by including a wide range of different employees and managers in these groups, they had been able to obtain valuable information about levels of awareness of, perceptions of, and attitudes towards flexible working.

At Oxford Brookes University an audit was conducted to gain information on staff experience of work–life balance policies and practices. The audit was carried out through a self-completion staff survey and focus groups.

The staff survey was used to examine issues related to work–life balance and flexible working. Its findings showed that virtually all staff (98 per cent) agreed that it is important to achieve a balance between paid employment and personal life, and that it enables people to work better (93 per cent). In the survey, 84 per cent of staff said that work–life balance should be the joint responsibility of both employers and employees.

Sixty volunteers took part in the focus groups, representing a good cross-section of University staff (including both academic and non-academic staff). The University was able to use the results to compare (and confirm) findings from the survey and also to provide more in-depth information concerning staff awareness of current work–life balance policies, their experience in practice at Brookes and the perceived advantages and disadvantages of introducing more flexible working practices.

A number of themes surfaced as a result of holding these focus groups, for example:

- lack of awareness of policies and practices relating to work–life balance
- lack of knowledge about where to find this information
- ambiguity about when the University was providing benefits above and beyond legislation relating to work–life balance and flexible working
- equity in the application of policies across different parts of the University.

Both the focus groups and the qualitative data obtained from open questions in the questionnaire indicate that staff experience of work–life balance at Brookes depends largely on the attitude of the individual’s line manager.

These findings from the audit contributed to the adoption of a change management project with financial support from the DTI’s Partnership Fund. This included the preparation of a guide:

- giving more visibility to existing good practice
- to be available to interested staff
- to be a resource for managers interested in the implementation details of work–life balance policies and practices.

The data collected through the audit will also help provide a benchmark for future progress and achievements.

Simonetta Manfredi, Oxford Brookes University
Part 9 Maintaining momentum

‘You can’t just think, “That flexible working thing’s done.” You’ve got to keep communicating all the time, and constantly reviewing.’ Peri Thomas, HR Manager, Loop

‘We all know that the pool of available talent is reducing. Flexibility for all is a great incentive to attract a more diverse group of people to Centrica. We want to be on their shortlists and this is a powerful way to achieve it.’ Carol Thwaites, work:wise Project Manager, Centrica

The organisations interviewed for this guide were at different stages on their flexible working ‘journey’. Some were working towards putting together written guidance for managers to help them understand the process of managing flexible working with their teams. Others had put both policies and guidance in place and were now working hard to raise the profile of flexible working and flexible workers, where they existed in the business.

Nearly all of the HR professionals involved in the CIPD research emphasised the importance of maintaining momentum when it came to the flexible working projects they worked on. Project teams may be set up to drive a new flexible working initiative. Effort is invested in creating interest and excitement in the organisation. The real challenge, however, is making flexible working part of ‘business as usual’.

Previous sections of this guide have emphasised the importance of building a culture that enables flexible working to happen in practice and the need for managers to have both the skill and the will to manage a more flexible workforce.

Raising awareness of flexible working opportunities needs to happen on an ongoing basis, employees need convincing that taking up flexible working would not be ‘career-limiting’, and measurement and evaluation need to happen to ensure managers are able to recognise the business benefits.

Depending on its stage in the journey, each organisation needs to identify its own next steps.

The final part of this guide first examines the example of the DSTL, which, when their organisation was ‘born’ following its separation from the wider MoD, were prompted to question the assumptions they had made about how well flexible working was working.

We then provide an insight into where two other organisations in the study – Centrica and the Scottish Legal Aid Board – are now planning to focus their efforts.
DSTL is the centre of scientific excellence for the MoD. Previously part of the wider MoD, in 2001 three-quarters of the Defence Evaluation Research Agency was privatised – with the remaining 3,000 staff forming DSTL.

With a history as part of the MoD, the idea of flexible working was certainly not a new one. However, the need to revisit and revitalise the operation of flexible working was clear when the new organisation was created.

The DSTL’s strategic objectives include ‘Helping people to realise their full potential’. In addition to training and professional development, flexible working was seen as key to the aim of allowing people to give their best to the organisation and to deliver the best and most innovative advice to the MoD. With this in mind, the HR director sponsored the project led by HR that asked:

• What arrangements do we have existing?
• Do we need to do anything more about this?

In response, the HR team facilitated a number of focus groups (with over 60 people across the business, both employees and managers participating), and carried out site visits to investigate further. What they found was that, although they had good practices, it was necessary to:

• remove bureaucracy
• promote consistency across all sites
• further enhance the trust between managers and their teams.

The findings were presented to HR senior management and to the DSTL board, who backed the proposal and supported the team in its efforts to address these three issues.

As a result of a further consultation with the business and managers, it was proposed that the flexible working scheme should allow individuals to work their hours at any point between 7am and 7pm – rather than requiring defined core hours. As a result, it would no longer be compulsory to be at work at 10am. However, if you weren’t there, you would be required to use your electronic diary and email system to alert colleagues to this fact.

Rather than managers being expected to monitor the working hours of all their team, individuals would be empowered to record their own working hours, using an electronic form. Managers were encouraged to ‘manage by exception’ only where they believed problems with working time existed, rather than monitoring all team members’ hours as a matter of course.

Pilot projects were set up in two different departments to experiment with the proposed new flexible working scheme [see p46]. Subsequently the new proposals were given the go-ahead by the board. The communication of the new arrangements to the rest of the organisation continued with cascaded briefings and the chance for employees to ‘sign-up’ for the new flexischeme. Some 80 per cent of employees have now done so.

Bijal Parikh, DSTL
At the end of the first phase of its work:wise programme – which has seen 3,000 employees look at new ways of working – Centrica’s next focus will be to evaluate progress to date.

Training and engagement activities such as roadshows, manager coaching and team workshops have been evaluated as they have taken place. Initial small-scale surveys have also provided an indication of measures, such as a significant reduction in travelling time and mileage for staff as a result of work:wise.

Next, Project Manager Carol Thwaites will be looking closely at each business area and where they have seen benefits – for example, in absence, retention, recruitment and the way office space is used. Since the work:wise programme was introduced, Centrica has been able to close one large office building and has needed to re-open only one much smaller office. This means, in commercial terms, there have already been considerable savings in property costs.

Now the pilot has finished and work:wise is more established, they are also considering how the recruitment process can be used to communicate the different work styles available at Centrica – ideally commencing dialogue with job candidates about their preferred way of working before they start.

They are also considering how the work:wise scheme might be extended to other areas of Centrica (such as contact centres). So far, the employees involved have been drawn largely from headquarters or managerial centres.

‘We all know that the pool of available talent is reducing. Flexibility for all is a great incentive to attract a more diverse group of people to Centrica. We want to be on their shortlists and this is a powerful way to achieve it.’

Teresa Kavanagh and Carol Thwaites, Centrica
For the Scottish Legal Aid Board, steps following the end of their formal flexible working project have included:

- working with managers to improve their ability to plan and manage their resource effectively
  [see p32]

- producing written guidance to all employees on what flexible working means at the Board

- implementing a standardised team-based time-planning and time-capture system

- effecting changes to employment contracts to reflect core contractual hours – and to highlight flexible working as a benefit for an employee of the Board.

The Board will next look more closely at developing its technologies and work processes to support formal homeworking and remote working. This was allowed on a limited informal pilot basis during the first and second phases of the Board's Work–Life Balance project. The final project review indicated that homeworking was occurring on a larger scale across a number of departments than could be formally supported at this stage by the business. A new project is therefore being established to take forward formal home- or remote working at the right pace to fit with the business’s technology and work process developments.

‘We’re still busy with it… it doesn’t go away!’, is personnel manager and project manager Moira Williamson’s observation on the issue of flexible working.
Further reading and references

CIPD resources
Free for CIPD members to download from the Information Resources section of the CIPD website at www.cipd.co.uk/onlineinfodocuments


Available from the CIPD online bookstore


Other resources


Useful websites
ACAS: www.acas.org.uk/publications/b09.html

Creating More Balance: www.cmb.org.uk/employers

DTI: www.dti.gov.uk

Equal Opportunities Commission: www.eoc.org.uk


Women and Equality Unit: www.womenandqualityunit.gov.uk


Employers for Work–Life Balance: www.employersforwork-lifebalance.org.uk

TUC: www.tuc.org.uk/changingtimes

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Equal Opportunities Commission: www.eoc.org.uk


Women and Equality Unit: www.womenandqualityunit.gov.uk


Employers for Work–Life Balance: www.employersforwork-lifebalance.org.uk

TUC: www.tuc.org.uk/changingtimes
We explore leading-edge people management and development issues through our research. Our aim is to share knowledge, increase learning and understanding, and help our members make informed decisions about improving practice in their organisations.

We produce many resources on people resourcing issues including guides, books, practical tools, surveys and research reports. We also organise a number of conferences, events and training courses. Please visit www.cipd.co.uk to find out more.