

Introduction

This guide provides practical help to enable you to put together action plans, for the development of work-life balance policies and, to tackle work-related stress.

It takes you through the business case for work-life balance helping you to take a fresh look at your organisation. Showing you how to audit policies and procedures to plan a cost effective framework for your work-life balance strategy.

In addition case studies of Employers of Choice in Warwickshire demonstrate the positive impact flexible working and other employee benefits can have on your organisation.

Part 2 of the guide looks at the Health & Safety Executive's Management Standards for work-related stress.

It takes you through an audit process to help you develop an action plan and stress policy and also demonstrates how appropriate work-life balance policies can help manage and sometimes prevent work-related stress.

Case studies included in this guide profile organisations in the West Midlands which have attended Warwickshire County Council's HSE Stress Management Workshops and, as a result, have successfully implemented stress reduction mechanisms in the workplace.

*People are your strongest asset
- give them reason to stay not
reasons to leave!*

Work-Life Balance

The Way Forward

The demographic profile of the population is changing and with it people's expectations. This will increasingly become an issue for employers and it is clear that we will have to change the way we work over the next 20 years and have a positive approach to flexible working practices.

Successful work-life balance strategies can be achieved by changing attitudes and improving on existing initiatives which may have been introduced on an ad-hoc basis.

The key is to listen to your staff, ensure you understand the profile of your workforce, and to come up with solutions which are not only appropriate to your business needs but which help your staff to balance work with their home responsibilities and aspirations.

Work-Life Balance:-

- can help individuals to manage their personal priorities, which helps reduce stress, and enables you to recruit a more diverse workforce.
- can help managers with performance improvements and they will benefit from a more committed workforce.
- can help managers comply with legislation, assist the development of good working practices, and save on recruitment and training expenses.
- can help facilitate the development of a change in culture, improve the corporate social responsibility and community image of your organisation, and at the same time will improve employee relations.

The Business Case

Staff retention

- Good work-life balance policies keep staff happy and help retain valued members of the team. A caring culture helps productivity and also reduces recruitment and training costs.
- Women are more likely to return after maternity leave and remain with an organisation if employers are able to offer more flexibility or possibly a phased return to full time work. Why lose your investment in training?

Recruitment

- People are looking for employers who offer more than a good salary (confirmed by employers in Warwickshire). People want to work and enjoy life.
- A range of flexible working arrangements (see pages 5 & 6), can improve the image of an organisation and make it an employer of choice.
- Work-life balance policies can help recruit staff with specific skills and can give organisations an edge on their competitors.
- Good work-life balance policies can improve the corporate image in the local community.

Sickness absence

- Workplace stress, sickness and personal problems all cause absence from work and are costly for the employer. Workplace stress is such an important issue that this is dealt with separately in Part 2, from page 33.
- Flexible working can ease the problem of absence related to a sick child or other personal problem and an understanding employer can encourage staff to be honest about their reasons for taking personal sick leave! This could improve loyalty and reduce sickness and stress-related ill-health.

Productivity and performance

- Flexible working opportunities, particularly for parents, can increase productivity and morale and can improve competitiveness.
- People are more relaxed and happy if they are not worrying about personal commitments and performance will improve.

Commitment

- Allowing employees to work flexibly while trusting them to meet their targets can greatly improve staff morale and commitment.
- Leading by example and being open and honest with employees can increase loyalty and be a winning strategy for running a successful business.

Customers

- Remember not everyone wants to work 9 - 5! People like their work patterns to fit around their life-style and flexible work options can widen your recruitment base and allow you to meet customer needs.
- Retaining knowledgeable, reliable, staff who have a good working relationship with clients makes good business sense! Flexibility will encourage people to stay!

Flexible Working Options

The following flexible working arrangements can aid recruitment and retention and improve employee motivation. Whatever policies you choose must be consistent with business need.

Option	Definition	Benefits
Compressed working week or fortnight	Full-time employees who wish to work their contracted hours can do so over extended days but a shorter week/fortnight. Examples include working four long days instead of five, doing a nine day fortnight, or shortening breaks and leaving earlier.	Extended "cover" of some working days. Could mean retaining a valued member of staff.
Staggered Hours	Staggered hours working has flexible start and finish times; it is not intended to reduce the number of working hours from normal full-time hours and does not accrue "extra" hours. The contracted hours and employee benefits remain unchanged.	Could mean retaining a valued member of staff. Could widen the recruitment base and improve loyalty.
Part-Time Working & Reduced Hours	The number of hours worked is determined by (a) the needs of the job, and (b) the needs of the employee. Part-time employees can increase the flexibility of worked hours (for instance if cover is only needed at peak times). Part-time employees are entitled to the same benefits as full-time employees, pro rata to the number of hours they work.	Allows cover for busy periods. Can help women returning from maternity leave.
Job Share	Job sharing is according to individual contract. The job sharer has a permanent contract with pro-rata pay and benefits and shares responsibility or has joint responsibility for a full-time job description. Schedules and a division of responsibilities by task and time between sharers, including a hand-over period is agreed. An essential part of job share is to ensure effective communication between both parties, and also with the line manager.	Can increase expertise available & can provide increased flexibility. Job sharers can cover for each other's absences. It can enable parents to enjoy part-time work appropriate to their skill level and ability.

Option	Definition	Benefits
"V" time (Voluntary Reduced Work time)	This arrangement is generally on a temporary basis, usually ranging from 5% to 50% of normal hours. An employee trades pay for time over a given period. The reduction is for a specified period of time, usually six to twelve months. Employee benefits are maintained, pro rata where necessary. The employee is contracted to return to full-time work on a given date, unless otherwise negotiated.	Can help to retain staff who are experiencing a difficult personal situation.
Flexitime	Employees choose start and finish times within set limits. Employers usually set "core times" (e.g. 10 - 12am and 2 - 4pm) during which employees have to be at work. Credit and debit hours can be carried beyond an accounting period (e.g. monthly), with the option of taking "flexi-leave" or TOIL.	Can spread travel to work over a longer period. The business can respond to peaks and troughs in demand. Can help with work-life balance.
Annualised Hours	The number of hours an employee is expected to work per annum are agreed which can be varied from week to week and month to month in accordance with the needs of the business and the needs of the employee, following mutual agreement.	People work hours that suit their personal commitments. The business can respond to seasonal demand.
Term-time Working	Term-time working is done on a permanent contract, that continues throughout the year, including school holidays. An employee can work to either a full-time contract and take unpaid leave during school holidays, or a part-time contract, but work extra days during term-time which can be accrued and taken off during school holidays.	Helps recruit employees with school age children.
Home/Tele-Working	The main place of work is the employee's home (full-time) or the employee works either completely or for a percentage of time from his/her home or somewhere other than the company base. The home/site must be checked by a H & S Officer in terms of equipment, environment, communication, connections, etc.	Relieves travel to work issues. Can increase productivity. Can allow people to work at times which suit them and the business.

In April 2003 the Employment Act introduced a new right for parents with young or disabled children to request to work flexibly this was amended in 2007 to cover people caring for adults.

Work Life Balance Checklist

Before embarking on an action plan it could be useful to work through the following checklist. You are then ready to carry out a thorough company audit and to move on to the planning stage.

Steps to Strategy	
1. What are your core business needs? What do you want/need as an organisation?	
2. Consider your customers – how will your work-life balance policies affect them?	
3. Consult with staff – find out what people want.	
4. Think about flexible working – can start and finish times vary?	
5. What training will be needed to help managers to manage flexible teams?	
6. How can you cover sickness or leave?	
7. Do you need help to cover busy periods?	
8. Adopt work-life balance policies and practices which suit the needs of the organisation and individuals – and be creative – think outside the box!	
9. Produce written procedures for implementation, monitoring and review.	
10. Include an application form, in written procedures, to enable people to apply to change their working hours.	
11. Managers must lead by example – get them involved!	
12. Communicate change throughout the organisation – get everyone on board.	
13. Running a pilot can be a good idea. Evaluate it before introducing as policy.	
14. Amend your policies or extend the programme as necessary – nothing is in tablets of stone!	
15. What next? Monitor and evaluate.	

Other things to consider – use all the data you have available

Staff with caring responsibilities including children
Access to childcare – is this a problem?
Staff retention
Age profile of workforce
Rate of staff turnover
Recruitment – problem areas
Why do people leave?
What arrangements are in place to help your workforce have a life work balance?
What you really want to achieve – eg improved retention, reduced absenteeism, more applicants with appropriate skills

Gather additional information:-

Confidential Staff Surveys
Focus Groups
Informal Chats
Appraisals
Exit Interviews
Sickness Absence
Ideas Schemes

Cost/ Benefit Analysis

Cost of replacing one employee including voluntary resignation costs, temporary replacement costs, recruitment costs and induction and training.

1. Voluntary resignation, which include holiday pay not taken, exit interviews etc.

	£
Holiday pay, length of service bonus etc	
Managers time for references etc	
Pension administration	
Payroll administration	
Personnel administration	
Exit interviews etc	
Other	
TOTAL	

2. Temporary replacement costs which include agency fees, clerical costs, cost of experienced staff providing on the job training and advice

	£
Holiday pay, length of service bonus etc	
External Agency costs	
Payroll administration	
Arranging cover	
Formal/informal instruction/training	
Other	
TOTAL	

3. Recruitment & Selection Costs

	£
Advertising costs	
Applicants expenses	
References – associated costs	
Selection tests	
Medicals	
Administration time processing applications	
Interview administration time	
Managers time	
Other	
TOTAL	

4. Induction and Training

	£
Relocation or temporary accommodation costs if appropriate	
Equipment including work wear	
Training costs including trainer and equipment	
Administration including payroll	
On the job training time including, supervisor, manager and colleagues	
TOTAL	

5. TOTAL cost of labour turnover for losing and replacing one employee

Resignation	
Temporary Replacement	
Recruitment and Selection	
Induction & Training	
TOTAL	

Financial Model

The following method will enable you to roughly calculate the annual cost of staff turnover.

Staff Turnover (T)

$$\frac{\text{Total number of leavers over a period}}{\text{Average total number employed over a period}} \times 100$$

The total leavers includes people who left due to dismissal, redundancy or retirement.

Example

T = Turnover eg 7%
X = Number of employees eg 82
R = Average cost of replacing 1 person eg £3,000
S = Approximate total cost of replacing staff in one year

$$X \times T \times R = S$$

$$82 \times 7\% \times £3,000 = £17,220$$

$$S = £17,220$$

Annual Cost of Absenteeism

X = Number of employees eg 82
Y = Absence rate per year eg 5%
Z = Average wage eg £14,000

A = Annual wage bill

C = Cost of absence per year

$$X \times Z = A$$

$$82 \times £14,000 = £1,148,000$$

$$A \times Y = C$$

$$5\% \text{ of } £1,148,000 = £57,400$$

C= £57,400

If the employer in this example reduced absenteeism by 1% a saving of £11,480 per year would be achieved.

Source - Advance Personal Development –WCC Work-Life Balance Training Course

You are ready to develop your action plan!

Summary!

Business Needs

- Conduct a staff survey, or include work-life balance questions in an existing survey.
- Hold group meetings to get the views of your staff – what measures would help them cope with work and promote a more relaxed lifestyle.
- Build on your findings to develop a programme which is specific to your organisational needs.
- Look at internal information about absence, sickness, retention, recruitment.
- What are the problems? What do you want to achieve?
- Carry out research, look at case studies or talk to other employers about policies that work.

Culture

- Develop policies which work best for your organisation taking one step at a time. Test new ideas in pilot groups before rolling out as policy.
- Create an open, honest culture where people can discuss work-life balance issues.
- Work-life issues must be a core business activity with policies available to all members of staff.
- Money should be available to assist with the development of initiatives and to ensure staff are trained to understand and implement policies. A cost benefit analysis is a good idea. Identify costs of implementing the new strategies versus savings using the 'Financial Model' supplied. Improving retention rates and reduced recruitment costs could be a major saving.
- Ensure staff are informed about developments, policies and activities. Communication is a vital tool in the development of strong work-life balance strategies. Keep staff involved in the change process so that they understand the benefits and are committed to the new culture.
- Provide written procedures.
- When flexible working policies are introduced ensure that this does not put increased pressure on other team members. Policies are sure to fail as staff become stressed, disillusioned and less productive.
- Ensure commitment from senior managers and board level. Try to use senior managers as role models to highlight work-life balance policies that are successful. Policies must be all encompassing and it must be clear that employee well being and work-life balance are key organisational values.

Individuals

- Give them time to consider their priorities and what works for them on a professional and personal level. Give people time to adapt.
- Give them the opportunity to plan their own work programme.
- Offer training appropriate to the job.
- Involve staff in the change process or it will not succeed.

Policies

- Ensure policies reflect the needs of the business.
- Ensure equality of opportunity for all by making policies widely available.
- Monitor the effectiveness of policies and be prepared to make changes or adjustments to suit business needs and employee requirements.
- Ensure managers understand how policies work and issue clear guidelines. Invest in training to demonstrate the business benefits.
- Communication channels should be excellent and far reaching throughout the organisation. Remember you must explore every medium to ensure all employees understand and benefit from work-life balance policies on offer. Communication is an on-going and continuous process.
- Launch the new initiatives – make it a special event and an important development for the organisation.

What Next?

Evaluate - it is vital that benefits are monitored and improvements made in response to change within or outside the organisation. Listen to your staff through a variety of mediums, surveys, focus groups, informal chats, ideas schemes etc

Continually refer to your ACTION Plan – what are your priorities, what are your current business needs?

**For further information contact Merle Bayliss, Work-Life Balance Adviser,
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Work-Life Balance Action Plan – (Refer to ‘Steps to Strategy’)

How to put your work-life balance (WLB) needs into practice by looking at your priorities and developing a plan to accommodate the needs of your organisation. Headings are based on the Investors In People work-life balance model.

CULTURE	Is work-life balance recognised and valued in your organisation?			
What should be happening?	WHAT IS HAPPENING?	ACTION REQUIRED	BY WHO	BY WHEN
The organisation understands what WLB means and people feel it has a positive effect on the way things are done.				
WLB should feature in day to day work. It should be clearly defined, communicated and understood.				
Regardless of WLB choices people have access to career development and training.				
Managers are committed to WLB and act as role models.				

Is work-life balance central to your organisation's objectives? (See 'Work-Life Framework')				
STRATEGY	WHAT IS HAPPENING?	ACTION REQUIRED	BY WHO	BY WHEN
<p>What should be happening?</p> <p>The WLB strategy fits the organisation's objectives, demographic changes, employment legislation and the needs of customers. Written procedures for implementation monitoring and review are in place.</p> <p>Managers are aware of the impact of legislation and demographic change on the strategy.</p>				
<p>The benefits of work-life balance to the organisation are understood. Policies for management development, performance management, reward and recognition are in place.</p>				
<p>A consultation process, involving all staff is in place which ensures policies reflect their needs.</p>				

Are successful work-life balance policies being implemented?				
POLICIES	WHAT IS HAPPENING?	ACTION REQUIRED	BY WHO	BY WHEN
What should be happening? Resources are available to put WLB policies in place which take into account the needs of individuals and relevant legislation and good practice.				
WLB solutions are monitored to demonstrate benefit to the organisation and the individual. Policies are reviewed on a regular basis.				
Managers know the goals of the organisation and the role they play. Work-life balance is included in their training and development.				
Contracts of employment are clear and employees understand their statutory rights.				

EFFECTIVENESS	Are policies delivering positive results?			
	WHAT IS HAPPENING?	ACTION REQUIRED	BY WHO	BY WHEN
What should be happening? Solutions are having positive benefits on the organisation and its people.				
There are improvements in recruitment and retention and sickness absence.				
Policies are reviewed and adapted to achieve the organisation's goals, the needs of the people and customers.				
A policy of continual improvement is in place.				

**The Work-Life Framework – How Are You Doing?
Use this checklist to identify gaps in your strategy**

The following framework indicates ways to put your work-life balance policy into practice effectively	Do you do this?	
	YES	NO
STRATEGY AND OBJECTIVES		
There is an 'open door' approach to listen to staff		
Work-life issues are addressed as a core strategic activity		
Business and social reasons for the work-life strategy are identified and understood		
Continuous improvement is facilitated through written procedures for implementation, monitoring and review		
CULTURE AND ATTITUDES		
Work-life issues and how they affect individuals are discussed		
Cultures and attitudes are seen to be as important as formal policies		
Consult with staff and agree strategies (what do people want?)		
Career development is not based on hours but on outputs		
POLICIES AND RESOURCES		
Contracts of employment are clear and employees understand their statutory rights		
Policies and practices are adopted to suit the needs of the organisation and employees		
Adequate resources are invested in order to promote policies and practices and to ensure they are appropriate to people's needs		
The return on investment is clearly demonstrable, helping to promote take-up of practices		
COMMUNICATIONS STRATEGY		
Communication is used to encourage take-up of relevant policies and reinforce cultural values		
Work-life strategy is communicated effectively, giving evidence of take-up and benefits to the business as well as to individuals		
Two-way communication between employer and employee is encouraged		
A shared vision is developed so that both employer and employee share responsibility and benefits		
MANAGEMENT		
The employer adopts a management style that reflects respect for work-life balance		
Impact on work-life balance of internal changes such as mergers or relocations is taken into account		
Managers are trained to plan and co-ordinate a more flexible workforce		
INNOVATIVE WORKING		
New ways to organise work are developed to meet individual and business needs		
It is recognised that people's needs and availability may change over the lifecycle		
Team members plan how new ways of work will be managed so work-life balance is maintained for all		

Source: The Work-Life Manual Industrial Society 2000

BD Commercial Services Ltd, Rugby

Business Sector: Commercial
Vehicle Repair

Employees: 9 full time 3 part time

The husband and wife team started this business 11 years ago running a mobile repair service for commercial vehicles. In 2006 the business moved into larger premises, with 12 members of staff and where the working environment is exceptional for this business sector. Flexible working is the norm, people are consulted before changes are made, a new training scheme has been set up to allow apprentices to join the business, and a shift system in the workshop extends opening hours to accommodate the needs of clients.

Why have work-life balance policies been introduced?

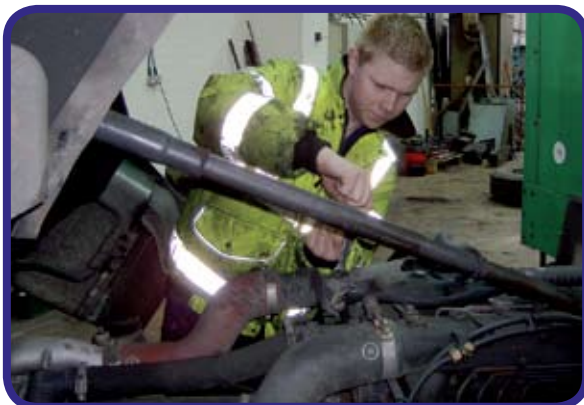
To help employees and directors deal with personal commitments.

What work-life balance policies are most beneficial to the organisation?

A flexible approach to work time in the office. People work around their personal commitments, changing hours to suit and working from home when necessary.

How are work-life balance issues identified?

By talking to staff and responding to issues as they occur.



How are work-life balance policies communicated?

- Informal chats
- Team meetings

What systems have been set up to review work-life balance policies?

Communication with the whole team.

What arrangements have been introduced in the last 12 months?

- A shift system has been set up for mechanics, in consultation with employees, to enable repairs to take place in the evening when vehicles are not in use
- The Company approached Warwickshire College to set up a training scheme in HGV repair to enable them to employ young mechanics through an apprenticeship scheme

Brian & Julie Davies, Directors said

“Being business owners and parents with young children, we recognise the need to be flexible within our working environment, to enable all our staff to work to their full potential. We have always taken the view that we would never ask our employees to do anything that we would not be prepared to do ourselves. We feel that it's this flexible management approach that helps our workforce to develop a positive attitude towards their work which is then passed on to our customers. Winning this award was a complete surprise to all of us and full credit goes to our entire team without which there would not be a BD Commercial Services.”

Nuneaton & Bedworth Citizens Advice Bureau (CAB), Bedworth

Business Sector: Voluntary

Employees: 5 full time 7 part time

Nuneaton & Bedworth CAB has a limited workforce and is supported by 55 volunteers who work on average two days per week. The bureau makes contact with 12,000 clients per year providing information and advice on a wide range of subjects. It aims to recruit and train local people (both paid and voluntary) that reflect the local community.

The organisation has developed a good range of flexible work options and work-life balance policies in a small team and with limited funds. Many paid workers start as volunteers and are given the opportunity through training and development to move into new career paths either in or outside the organisation. People feel motivated and grow in confidence in this supportive atmosphere.

Why have work-life balance policies been introduced?

To maintain a happy, supportive and motivated team which has extended and improved the service to the community.

Flexible work patterns has meant better than average retention rates for both paid and voluntary staff and greater success in recruiting volunteers.

What work-life balance policies are most beneficial to the organisation?

Flexitime working.

How are work-life balance issues identified?

- Relevant employment legislation
- Direct contact with managers
- Recruitment & induction
- Daily & Monthly team meetings
- Annual joint progress reviews with individuals
- Annual planning & development days

How are work-life balance policies communicated?

- Induction
- Staff manual
- Team meetings
- Notice boards
- A message book for important information
- Accessible management team



Hair Management, Warwick

Business Sector: Hair Design

Employees: 20 full time 10 part time

This hair design business operates from two sites in Warwick and attributes its success to consistent levels of quality, value, enthusiasm and professionalism. In 2003 a conscious decision was made to change the company image which has resulted in a 20% increase in business. New premises were found and increased flexibility was offered to staff to improve work-life balance and to help retain people with skills, particularly working mums, who form 30% of the workforce. New policies allowed the salons to increase opening hours and to provide more flexibility and choice to clients.

The Director believes business success depends on a great team which offers a great service to customers. This is certainly the case in this organisation. In spite of increasing opening hours to cope with client expectations the work-life balance of staff has not been compromised. The Director has created a bubbly family atmosphere where flexibility is the key.



Why have work-life balance policies been introduced?

To bring out the best in staff so that they help create a successful business where staff and clients are happy.

What work-life balance policies are most beneficial to the organisation?

Flexi-time, part-time and term time initiatives which apply to a high number of staff. This has enabled Hair Management to hang on to talented members of staff and has resulted in astonishing staff retention.

How are work-life balance issues identified?

- Staff know they can raise issues at any time.
- Employees are encouraged to produce a 'dream board' which identifies their dreams and desires

How are work-life balance policies communicated?

- Regular breakfast meetings with managers
- Weekly team meetings
- Monthly one-to-ones
- Annual team days

What systems have been set up to review work-life balance policies?

- Client opinion sheets
- Client research evenings
- Mystery shopper visits
- Monthly one-to-ones
- Customer care programme

What arrangements have been introduced in the last 12 months?

To support extended opening hours new shift systems are in operation which suit the lifestyle and commitments of staff. The shift patterns are carefully managed and staff are given ample notice about working hours.

Education for Health, Warwick

Business Sector: Respiratory & Cardiovascular Education

Employees: 29 full time 22 part time

This independent education and research institution is 20 years old in 2007 and has grown considerably over the last five years from 12 to 51 staff which has included a merger of two charities. It provides training in cardiovascular disease and respiratory problems for health professionals and its educational programmes, accredited by the Open University, are run nationally and internationally.

The organisation offers flexibility and choice to encourage people, with the right skills, to stay with the organisation, regardless of job role. It actively encourages internal progression and growth of every individual. This is clearly demonstrated through an employee at director level who decided to put family first and only works a few hours per week, on annualised hours, while still feeling part of the organisation and being involved in directors meetings and decision making. This is a win win situation for the organisation which has retained a skilled, committed, member of staff and the employee who feels privileged to have a challenging job and still look after her children. Clearly this demonstrates that with creative thinking it is possible to offer flexibility and choice at any level!



Why have work-life balance policies been introduced?

- To support recruitment and retention in an area with low levels of unemployment
- To underpin the caring ethos of the organisation
- To maximise the efficiency of the organisation by retaining good staff

What work-life balance policies are most beneficial to the organisation?

- Working hours negotiated with individual employees to accommodate work and home commitments, including annualised hours
- Allowing staff to leave early during the World Cup, Test Matches, and bank holiday weekends
- Staff social events to celebrate personal achievement at individual, departmental, and organisational level
- Additional half day for Christmas shopping for all staff
- Home working opportunities

How are work-life balance issues identified?

- Appointment of HR professional
- Strong relationships between line managers and employees
- Open door policy and hands on approach of Chief Executive
- Performance reviews every six months when aspirations and concerns are highlighted

How are work-life balance policies communicated?

- Bi-monthly team briefs
- Staff meetings
- Lunchtime seminars
- Notice boards
- Staff and new starters handbook
- All staff email communications and newsletter

Education for Health, Warwick

What systems have been set up to review work-life balance policies?

- Staff feedback at performance review twice a year
- Annual review of staff handbook
- Open forum at staff meetings
- Consultation, including suggestions/innovative box
- Development of organisational values

What arrangements have been introduced in the last 12 months?

- Stress awareness raised through a lunchtime seminar and notice board
- Introduction of study leave
- Development of induction programme which includes a new starters handbook to provide greater support through initial weeks of employment

Monica Fletcher, Chief Executive

said "During significant growth and change we have managed to retain our excellent staff and have successfully maintained the friendly ethos and value driven culture of the organisation. We have little problem attracting new staff and indeed have people waiting to join us. Our staff are highly committed and are prepared to 'go the extra mile' when necessary. I believe we are a more productive organisation as a result"

Tolbar Volvo, Warwick

Business Sector: Automotive

Employees: 31 full time 1 part time

This company is one of three Volvo dealerships operated by the Sytner Group which has eighty dealerships in total in the UK. It operates in a highly competitive commercial sales environment where it would be easy to forget the people. This is not the case! In 2005 Tollbar won the Employer of Choice Award in its category and the new MD, who moved to the current location in 2006 to improve his own work-life balance, is an excellent role model, and has brought a new dimension to the work-life balance policies already on offer. With his hands on approach the MD has improved the working environment, responding to ideas and suggestions, and ensuring staff are rewarded for hard work. The highly motivated team offer a good service to customers and the flexible working arrangements on offer, and the opportunity for training and personal development, encourage people to stay with the organisation.

Why have work-life balance policies been introduced?

- To ensure low staff turnover
- To ensure staff morale remains high
- To ensure good two way communication
- To ensure excellent service to customers

What work-life balance policies are most beneficial to the organisation?

All policies help to keep staff happy and motivated which results in happy customers.

How are work-life balance issues identified?

- Managers operate an open door policy and will always make time to discuss issues with colleagues
- Staff suggestion scheme

How are work-life balance policies communicated?

- Employee handbook
- Staff notice boards
- Annual appraisals used to re-iterate company benefits
- Weekly team briefings
- Daily departmental meetings

What systems have been set up to review work-life balance policies?

- Best company to work for framework is discussed within weekly management meetings where personnel issues are first on the agenda
- Viewpoint questionnaire results are investigated thoroughly and all actions published and implemented

What arrangements have been introduced in the last 12 months?

The MD discusses responses to the viewpoint questionnaire one to one with all staff members and gets plenty of new ideas which are implemented where possible.



Alumet Systems (UK) Ltd, Southam

Business Sector: Manufacturing/
Construction

Employees: 74 full time 2 part time

Established in 1993 the company has maintained steady growth and is now one of the few specialist contractors to provide fully integrated building facades. The company regards its staff as the key to business development. This highly motivated fast growing business has become a lot more professional however the Directors like to think it has retained its unique quality where employees work to the same goals. It has retained the six original members of staff for 13 years.

Alumet is pulling out all the stops to keep pace with demand for its products whilst not losing sight of the needs of its workforce. To attract and keep staff with the right skills the organisation will consider all requests for flexible working and has opened offices in other locations to help staff with travel arrangements. People are really happy in this supportive, friendly, environment, where they are encouraged to train and develop, within the business, and where directors are excellent role models.

Why have work-life balance policies been introduced?

To support and reward the staff.



What work-life balance policies are most beneficial to the organisation?

- Satellite offices in the West Midlands, Yorkshire and Essex can recruit people with appropriate skills at a base closer to home
- Home-working for some staff
- A company flat in Leamington allows staff from satellite offices and nationwide construction staff (project and contract managers) to visit HQ

How are work-life balance issues identified?

- Staff representatives
- Staff suggestion scheme
- Personal development reviews
- Induction for new recruits
- Benchmarking with other companies
- Consultation with staff

How are work-life balance policies communicated?

- Welcome pack
- Employee forums
- Newsletter
- Notice board

What systems have been set up to review work-life balance policies?

- Open forums
- Regular meetings with all departments
- Social committee
- Open door policy

What arrangements have been introduced in the last 12 months?

- More team building events to break down the barriers between the factory, office and site staff
- Sponsorship of employee's personal events
- Additional holiday for long service

ConocoPhillips Ltd, Warwick

Business Sector: Oil & Gas

Employees: 174 full time 10 part time

This energy company, part of the ConocoPhillips worldwide organisation, distributes and markets fuels under the Jet Brand. The Head Office in Warwick offers its employees a comprehensive range of flexible working opportunities, enhanced maternity benefits, a flexible benefits package, and an employee assistance programme together with plenty of training and career progression opportunities. The working environment is totally open plan and the Marketing Manager believes that trust and flexibility work together to create a dynamic organisation.

Why have work-life balance policies been introduced?

- Successful organisations need a workforce that is stable and committed but also adaptable and flexible to meet business challenges
- Employees place more value on the quality of working life and are seeking greater flexibility to manage work commitments alongside personal and family life



What work-life balance policies are most beneficial to the organisation?

- Working Parents Policy – which includes a returners allowance, extended maternity/adoption leave and enhanced maternity pay
- Flexible work practices
- Employee Assistance Programme
- Further Education Assistance Plan
- Flexible Benefits Plan

How are work-life balance issues identified?

- Commissioning third party research
- Asking employees directly
- Feedback from other ConocoPhillips locations
- External seminars and conferences
- Potential legislative changes
- Continual review

How are work-life balance policies communicated?

- Intranet
- Plasma screens
- HR team in the open plan office are available to explain policies
- The Flexible Benefits Plan is mailed to employees home address and is available on-line
- The Health Plan was publicised through cards delivered to each persons desk, at group meetings, and via screens throughout the building

ConocoPhillips Ltd, Warwick

What systems have been set up to review work-life balance policies?

- Data spreadsheets are used by management team to track the success of policies
- Employee suggestions on new initiatives are considered by the Business Ideas Generation Team and responses given to all suggestions
- Usage of the Flexible Benefits Plan is monitored annually

What arrangements have been introduced in the last 12 months?

- 2006 Health Challenge – which addresses health & fitness, psychological, family and community well being
- New job shares
- All employees encouraged to participate in Education Business Partnership events
- Lunchtime Health & Safety Presentations

Rupert Turner, Marketing Manager, UK and Ireland said

"I believe that, for organisations to be successful, each individual needs to feel passionate about being part of the team. By continually reviewing our policies and objectives, we keep the organisation bubbling, creating an environment where people feel trusted, respected and empowered to achieve success."

Blitz Games Ltd, Leamington Spa

Business Sector: Computer Games

Employees: 162 full time 8 part time

The company was established in 1990 by two brothers who started developing computer games in 1981. In this fast growing industry the headcount increased by 50 in 2006 with further expansion planned. Staff have always been regarded as the most important asset and a wide variety of initiatives have evolved to create a unique working environment in an industry where competition for skilled staff is fierce. The company has a good reputation in its market sector, is incredibly flexible, offers a comprehensive benefits package and regular champagne celebrations on completion of projects. Blitz has recently launched its own training academy to encourage all staff to undergo structured personalised training. To contribute to the local community the company has worked extensively with schools over the last six years. People are extremely happy and motivated and the positive enthusiasm for the organisation is infectious. The brothers are hands-on, well respected, incredibly enthusiastic and sincere, and very much liked by their staff.



Why have work-life balance policies been introduced?

- Acknowledging staff survey results
- To motivate and retain staff
- A highly appealing and competitive employment package is required to attract talented staff

What work-life balance policies are most beneficial to the organisation?

- Flexitime, flexibase and flexible working
- Generous holiday package, increasing with time served, plus additional paid holidays for weddings, Christmas, dependent and compassionate leave, as well as extra days for non-smokers

How are work-life balance issues identified?

- Staff survey
- Intranet forums
- Direct emails
- Open door policy
- Regular individual reviews

How are work-life balance policies communicated?

- Blitzzone quarterly magazine
- Company handbook which includes useful information about the local area
- Intranet/internal emails
- Annual company update 'fun day'
- Written correspondence

What systems have been set up to review work-life balance policies?

- Staff survey
- Personal development reviews
- New starter feedback
- Management meetings
- All policies reviewed on a regular basis

The Myton Hospices, Warwick

Business Sector: Care

Employees: 74 full time 97 part time

The Organisation

The Myton Hospices is a registered charity which provides care and support for terminally ill patients, their families and carers. Staff are currently based on two sites in Rugby and Warwick and provide care within the In Patient Unit, in the day hospice and the hospice at home service. A third major development is planned in Coventry.

Why have work-life balance policies been introduced?

Clinical and medical staff work in difficult circumstances and the organisation endeavours to support them by offering a range of work-life balance policies to address their individual and group needs. In terms of flexible working the organisation will consider any request to reflect the individual lifestyle of staff whilst meeting the needs of the service.

What work-life balance policies are most beneficial to the organisation?

- Flexible working
- Reputation as an organisation that cares for its staff
- Savings are made on recruitment costs because of the pending file of potential employees

How are work-life balance issues identified?

- Individual requests
- Departmental meetings

How are work-life balance policies communicated?

- Staff handbook
- Emails to all staff
- Newsletters
- Notice boards
- Departmental meetings
- Quarterly staff meetings

What systems have been set up to review work-life balance policies?

Policies are reviewed and improved in consultation with staff

What arrangements have been introduced in the last 12 months?

- The employee handbook has been redeveloped
- New shift patterns have been introduced
- A sickness absence management research project
- Review and improvement in terms and conditions of service



Adams Childrenswear Ltd, Nuneaton

Business Sector: Retail

Employees: 505 full time 77 part time

The Company was set up 75 years ago, by Amy Adams making children's clothes, from a terraced house in Birmingham. Growing steadily, and introducing new clothing ranges on the way, there are now over 400 stores in the UK and 95 international outlets.

Work-Life Balance underpins the ethos of the business and the Chief Executive encourages people to take advantage of policies. Flexible working opportunities are available to people at all levels and it is refreshing to know that senior managers take advantage of part time working and job share. In addition the organisation offers a range of benefits including an extremely innovative maternity policy and a comprehensive training and development programme. Communication is excellent and new ideas are put forward at informal discussion and doughnut sessions as well as at the staff council.

People feel supported by the organisation and are hard working and motivated.

Why have work-life balance policies been introduced?

- In recognition that the success of the business lies in the hands of colleagues. Motivated and satisfied people have a positive impact on business performance
- To provide a great work experience
- A high proportion of colleagues are working parents and the policies, benefits and procedures, are of value to them and help them to achieve a work-life balance

What work-life balance policies are most beneficial to the organisation?

- Flexible working arrangements – to help retain high calibre staff
- Colleague Benefit Book
- Return to work bonus
- Maternity voucher scheme – a loan for the first months childcare
- Childcare vouchers

How are work-life balance issues identified?

- Informal doughnut & discussion sessions
- Informal feedback from colleagues via Benefit Book communication campaign
- Company conference
- Retail roadshows
- Informal chats and exit interview analysis

How are work-life balance policies communicated?

- Maternity guide
- Flexible working pack
- Benefits book
- Employment guide
- Induction booklet

What systems have been set up to review work-life balance policies?

- Feedback through informal discussion and exit interview analysis
- A formal survey introduced in 2007 which contains a specific area on benefits and work-life balance
- Measuring cost of labour turnover



Domestic & General Services Ltd, Bedworth

Business Sector: Insurance

Employees: 150 full time 170 part time

Domestic & General Services Ltd processes applications for breakdown plans, renewals and claims, in it's offices in Bedworth for the UK's largest specialist provider of appliance breakdown repair protection plans. Tasks include data capture, customer accounts, claims and customer correspondence.

A unique working environment has been created where people feel motivated valued and respected. The supportive culture has helped create confident, flexible, and productive workers who are happy in their roles. This organisation has never rested on its laurels and continually looks for new ways to support its staff.

Why have work-life balance policies been introduced?

- To improve recruitment and retention
- To reduce sickness and absence
- To increase morale
- To raise productivity
- To help staff where possible

What work-life balance policies are most beneficial to the organisation?

- Part-time working



- Flexible working patterns between 6.30am and 9.00pm
- Home-working
- Enhanced maternity pay
- Childcare vouchers
- Active learning and social activities

How are work-life balance issues identified?

- Usually employee's request
- Looking at needs at different stages of life

How are work-life balance policies communicated?

- Company Intranet
- Newsletters
- Emails
- Talking to staff

What systems have been set up to review work-life balance policies?

- Monthly and quarterly analysis of labour turnover, recruitment costs, sickness & absence
- Annual survey of employees views

What arrangements have been introduced in the last 12 months?

- Homeworking extended to all departments – assessed individually
- Active Learning (Sports Council Initiative) – to improve fitness, health and wellbeing
- Work with Remploy to recruit people with disabilities

Dairy Crest Ltd, Nuneaton

Business Sector: Distribution

Employees: 365 full time 30 part time

This chilled dairy food company's vision is to become an employer of choice creating a workplace where people feel valued and motivated to give their best to the benefit of the business. The National Distribution Centre in Nuneaton consolidates orders from production facilities in the UK and France. Initially work-life balance policies were developed in response to employee demand, however, the Centre is now committed to offering all its employees the opportunity to work flexibly, which is unusual for the market sector and, which helps to provide a good service to customers. In the warehouse alone there are 50 different shift patterns. People are encouraged to move around departments, to take up training opportunities, and to progress within the organisation.

Why have work-life balance policies been introduced?

To benefit the work-force which in turn has improved business performance.



What work-life balance policies are most beneficial to the organisation?

Flexible working which suits individuals and the order profile of the company. To date all requests for flexible working have been accommodated.

How are work-life balance issues identified?

- Staff requests
- Management's desire to look after the workforce
- Staff committee

How are work-life balance policies communicated?

In the staff handbook.

What systems have been set up to review work-life balance policies?

- Monthly discussions between employees and team leaders
- Daily review of changes to employment law

What arrangements have been introduced in the last 12 months?

- Term time working
- Formalisation of policies
- Opening a staff shop
- Staff/family open day
- Healthy eating and fitness

Andrew Watson, Site Director said

"We believe that our employees are our greatest asset and we are committed to continually improving the benefits they receive at work. By making work-life balance a priority at Dairy Crest, staff retention and motivation is at a good level which has a positive impact on our company as a whole. As a result we have a happy, committed, and experienced workforce."

Part 2 - Developing appropriate work-life balance strategies can help you manage work related stress

The business case

It is widely recognised that stress in individuals can result in ill health. According to the Health & Safety Executive (HSE):-

- Each case of stress-related ill health leads to an average of 30.9 working days lost.
- A total of 12.8 million working days were lost to stress depression and anxiety in 2004/5.

A range of work-life balance policies can help prevent the damaging effects of work-related stress and have a positive effect on your organisations in terms of:-

- Employee commitment to work.
- Staff performance and productivity.
- Attendance levels.
- Staff recruitment and retention.
- Employee and customer satisfaction.
- Organisational image and reputation.

Effective people management and work-life balance policies and practices are key drivers for good performance and productivity. (see 'The Work-Life Framework' page18)

The moral case

Work related stress has an adverse effect on health. Research has identified strong links between stress and physical symptoms such as:-

- Heart disease and some cancers.
- Muscle tension and back pain.
- Headaches.
- Changes in appetite, nausea and gastric problems.
- Minor illnesses.
- Anxiety and depression.

The legal case

Health and Safety at Work Act 1974 – the employer should provide and maintain a working environment, so far as is reasonably practical, which is safe and without risk to health. This includes taking steps to protect mental health and general welfare at work.

Disability Discrimination Act 1995 – includes mental disability.

Management of Health & Safety at Work Regs 1999 – includes a duty to assess the risk of stress-related ill health arising from work activities.

Carrying out a proper risk assessment for stress should help to avoid prosecution and litigation.

Health & Safety Executive (HSE) Management Standards – an audit tool to help manage work-related stress

The Management Standards approach requires commitment from senior management and involvement of the workforce throughout the process. Ideally the process should be championed by a senior manager. Workplace stress is an issue for all employers and it is clear from the HSE audit tool, that it is directly related to good employee relations, good business practice and a range of work-life balance policies.

1. Working through this process will help you to understand:-

- the signs and symptoms of stress and equip you to tackle the problem.
- the importance of tackling stress within the workplace from a moral, legal, and business case.
- the importance of the audit tool and risk assessment process in working towards the HSE Management Standards for stress and ultimately a stress policy.
- auditing techniques and the importance of risk assessment.
- the potential of work-life balance policies for reducing stress in the workplace.

2. Managers/Health & Safety Officers will be encouraged to use the audit tool to assist in the development of a good working environment (as per the HSE factors shown below) where employees indicate that they:-

- are able to cope with the demands of their jobs.
- are able to have a say about the way they do their work.
- receive adequate information and support from colleagues and superiors.
- are not subjected to unacceptable behaviour eg bullying at work.
- understand their role and responsibilities.
- are consulted by the organisation when undergoing organisational change.

3. The HSE auditing process will help you understand the benefits of training people to make decisions about the way they work. Responding to the six factors outlined in the HSE stress management system will mean you can introduce stress reduction mechanisms, in the form of continuous support systems, which give individuals adequate information to confidently do their job with support from their colleagues and superiors.

4. Guiding you through the process will help you to:-

- think and work strategically.
- have time to grow your business.
- trust individuals and teams.
- understand that people bring solutions not problems.

5. Satisfactory completion of the audit and risk assessment should ensure:-

- an action plan is been developed to tackle stress.
- work-life balance policies are embedded in the planning process.
- preparation of a health and wellbeing policy is being considered.

6. Positive outcomes?

- People should share values and goals.
- Operational efficiency should be improved.
- Decisions should be made more speedily.
- Customers needs can be anticipated and met by all.
- Employers should see improved productivity and profitability.
- People should be happy at work.

All of the above contribute to the implementation and development of work-life balance and stress reduction in the workplace.

Signs and symptoms of stress

According to the Health & Safety Executive (HSE) stress is 'The adverse reaction people have to excessive pressure or other type of demand placed on them.' Some people thrive on high levels of pressure while others do not cope as well. We need some stimulation and adrenalin to help us get up in the morning, however, if we experience too much pressure and adrenalin levels are continually high we have the adverse reaction HSE are talking about. In terms of physical symptoms people experience:-

- rapid or uneven heartbeat.
- muscle tension and backache.
- fast shallow breathing.
- sweating.
- change in appetite.
- nausea and digestive problems.
- headaches.

The physical symptoms are caused by the action of adrenalin which affects all smooth muscle and normally helps people react to a sticky situation (the flight or fight syndrome).

Emotionally we feel:-

- pressured and distressed.
- tense and unable to relax.
- tearful and frightened.
- increasingly irritable.
- unable to make decisions.
- apathetic and have difficulty concentrating.

If people have more pressure than they can cope with in the workplace this can translate into:-

- increased sickness absence.
- reduced staff morale.
- reduced performance.
- increased staff turnover.
- poor retention rates.

Working through this guide will assist in the development of work-life balance policies which, will help to create a stress free environment and, in the long term will help with recruitment and retention and improved business performance. The Audit process and Risk Assessment will give you the tools to develop an action plan to tackle stress and to prepare a stress policy. Getting managers and employees involved in the process will:-

- increase trust between individuals and teams.
- ensure a better understanding of common goals.
- improve operational efficiency and improve service to customers.
- speed up the decision making process.
- make people feel happy and more committed.
- create a good working environment

HSE standards for stress help you to comply with the following existing legislation:-

- **Health & Safety at Work Act 1974** – taking measures to control risk at work.
- **Disability Discrimination Act 1995** – which includes mental disability.
- **Management of Health & Safety at Work Regulations 1999** – assessing the risk of stress related ill-health caused by activities at work.

HSE Stress Factors

Stressors identified by the Health & Safety Executive (HSE)

Demands – which include workload, work patterns, and the work environment.

The HSE standard is that:-

- Employees indicate that they are able to cope with the demands of their jobs.
- Systems are in place locally to respond to any individual concerns.

HSE states to be achieved:-

- The organisation provides employees with adequate and achievable demands in relation to the agreed hours of work.
- People's skills and abilities are matched to the job demands.
- Jobs are designed to be within the capabilities of employees.
- Employees' concerns about their work environment are addressed.

Solutions

Job Design – to keep staff motivated but not overloaded and pressured.

- Ensure adequate time is allocated for a job.
- Look at targets – are they realistic and attainable.
- Do people understand what their job entails?
- Are people's abilities matched to the job?
- Is the job repetitive and boring?
- Give people appropriate equipment.
- Change the way jobs are done if necessary.
- Put people in the picture – how does their job impact on colleagues and company objectives?
- Give people opportunities to review their job at appraisals etc.

Working Patterns – to fit with family and personal commitments

- Look at flexibility in working hours – can start and finish times be changed?
- Are people consulted on work patterns?
- Think about changing work patterns to improved productivity.
- Try to ensure hours worked fit with family/personal commitments.
- If shift systems are in place can timings be reviewed?
- Hold regular meetings with employees to discuss work load and individual problems.

(See business case – Flexible Working Options pages 5 & 6)

Training – to match people to jobs

- Ensure people are competent - provide training to help people cope with the demands of the job.
- Use appraisals as opportunities to discuss personal development and training.
- Link training to performance monitoring.

Physical Environment

- Ensure workplace hazards such as noise and pollution are controlled.
- Have policies in place to cope with bullying and harrassment.
- Look at the working environment, the desk, the light, the equipment etc.

Control – which includes how much say the person has in the way they do their work.

The HSE standard is that:-

- Employees indicate that they are able to have a say about the way they do their work.
- Systems are in place locally to respond to any individual concerns.

HSE states to be achieved:-

- Where possible, employees have control over their pace of work.
- Employees are encouraged to use their skills and initiative to do their work.
- Where possible, employees are encouraged to develop new skills to help them undertake new and challenging pieces of work.
- The organisation encourages employees to develop their skills.
- Employees have a say over when breaks can be taken.
- Employees are consulted over their work patterns.

Solutions

- Within reason allow employees to plan their own work to give them more control.
- Ensure people understand the boundaries to empowerment.
- Review performance on a regular basis and agree personal objectives.
- Cultivate a culture of trust where people feel able to express views and air problems.
- Hold team discussion forums to plan projects and to decide agreed outcomes.
- Make the most of people's talents and allocate responsibility accordingly.
- Ensure a range of communication channels are in place and that people understand company procedures.
- Negotiate new ways of working if necessary.

Support – which includes the encouragement, sponsorship and resources provided by the organisation, line management and colleagues.

The HSE standard is that:-

- Employees indicate that they receive adequate information and support from their colleagues and superiors; and
- Systems are in place locally to respond to any individual concerns.

HSE states to be achieved:-

- The organisation has policies and procedures to adequately support employees.
- Systems are in place to enable and encourage managers to support their staff.
- Systems are in place to enable and encourage employees to support their colleagues.
- Employees know what support is available and how and when to access it.
- Employees know how to access the required resources to do their job.
- Employees receive regular and constructive feedback.

Solutions

- Get to know your staff by holding regular one to ones to identify problem areas or pressures.
- Try to build a strong supportive team by holding regular liaison/team meetings to discuss work load.
- Include 'work related stress and emerging pressures' as an agenda item for team meetings and appraisals.
- Seek examples of best practice in terms of support from managers or colleagues and use them to encourage improved ways of working.
- Ensure access to managerial support is appropriate and timely.
- Introduce flexible work options to help staff with personal and family commitments (see pages 5 & 6 for work options).
- Ensure people are trained and competent to do the job - equip people with the right tools.
- Introduce initiatives which provide support for people at a personal level.
- Try to ensure the job fits the skills and abilities of the staff member.
- Ensure there is a no blame culture.

Relationship – which includes promoting positive working to avoid conflict and dealing with unacceptable behaviour.

The HSE standard is that:-

- Employees indicate that they are not subjected to unacceptable behaviours, e.g. bullying at work.
- Systems are in place locally to respond to any individual concerns.

HSE states to be achieved:-

- The organisation promotes positive behaviours at work to avoid conflict and ensure fairness.
- Employees share information relevant to their work.
- The organisation has agreed policies and procedures to prevent or resolve unacceptable behaviour.
- Systems are in place to enable and encourage managers to deal with unacceptable behaviour.
- Systems are in place to enable and encourage employees to report unacceptable behaviour.

Solutions

Policies and Procedures – to communicate clear disciplinary rules and guidance.

- Develop a written policy for dealing with unacceptable behaviour at work, which includes bullying, discrimination, absence, performance and general conduct - communicate this to the staff.
- Agree procedures in consultation with staff to deal with conflict at work and to avoid major disputes.
- Ensure staff can report, in confidence, unacceptable behaviour.

Team Building

- Take advantage of the diversity and expertise of your staff when setting up new projects and where possible try to avoid personality clashes.
- Develop a working environment where problems are discussed openly with managers.
- Encourage individuals to develop positive relationships built on good behaviour and respect.
- Introduce schemes to celebrate success and to reward achievement.
- Encourage the development of social activities.

Training

- Encourage good communication and provide training in interpersonal skills.

Role - whether people understand their role within the organisation and whether the organisation ensures that the person does not have conflicting roles.

The HSE standard is that:-

- Employees indicate that they understand their role and responsibilities.
- Systems are in place locally to respond to any individual concerns.

HSE states to be achieved:-

- The organisation ensures that, as far as possible, the different requirements it places upon employees are compatible.
- The organisation provides information to enable employees to understand their role and responsibilities.
- The organisation ensures that, as far as possible, the requirements it places upon employees are clear.
- Systems are in place to enable employees to raise concerns about any uncertainties or conflicts they have in their role and responsibilities.

Solutions

- Hold regular team briefings and one to one meetings to ensure people understand their role and how it fits with the responsibilities of other team members.
- Link personal objectives to team/organisation objectives and goals and ensure all staff have personal work plans.
- Agree performance targets/outputs with individuals and teams which are monitored and reviewed.
- Provide clear job descriptions and re-visit job descriptions following organisational change.
- Develop formal, comprehensive induction arrangements for new staff and ensure all team members understand the role and responsibility of new recruits (see case study Education for Health – page 23).
- Be sensitive to the particular needs of new starters who are school/college leavers, returners to work, people from ethnic minority groups or people with disabilities.
- Ensure training is available to keep people up to speed.

Change - how organisational change (large or small) is managed and communicated in the organisation.

The HSE standard is that:-

- Employees indicate that the organisation engages them frequently when undergoing an organisational change.
- Systems are in place locally to respond to any individual concerns.

HSE states to be achieved:-

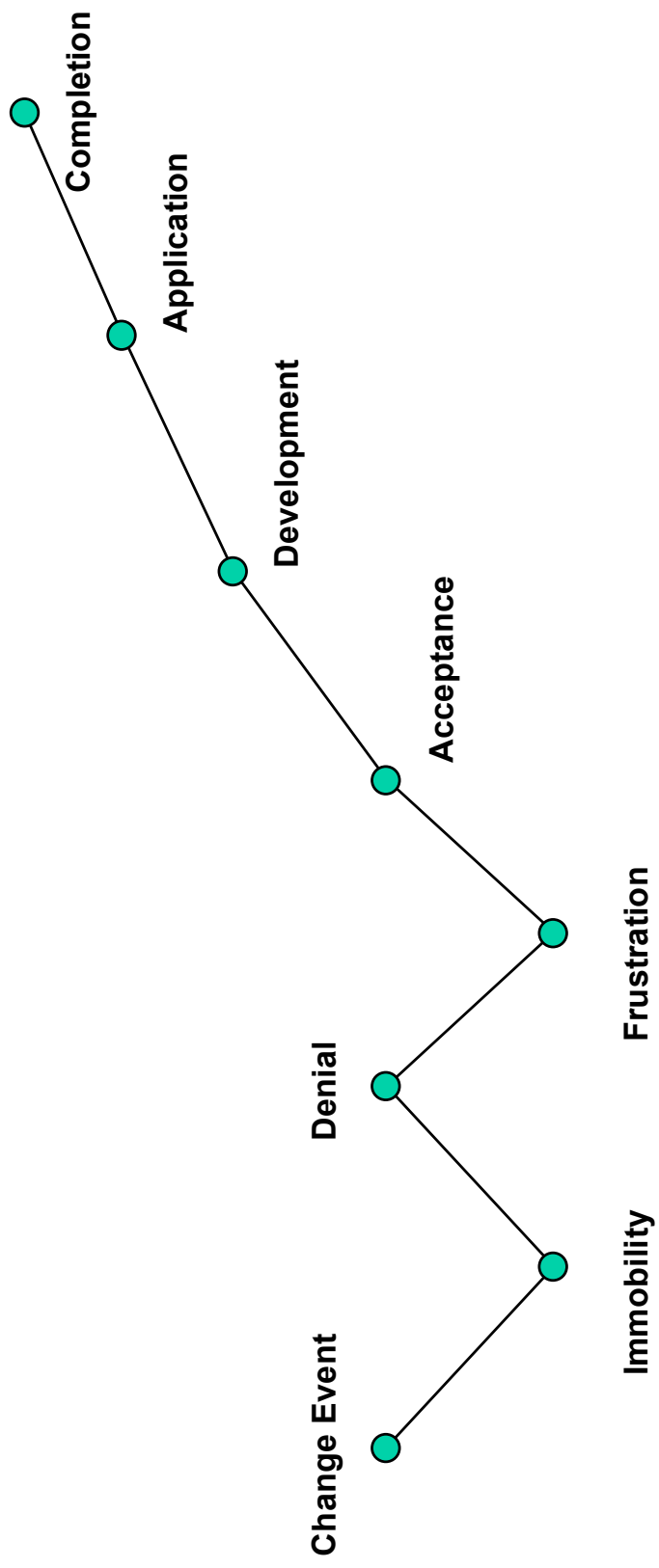
- The organisation provides employees with timely information to enable them to understand the reasons for proposed changes.
- The organisation ensures adequate employee consultation on changes and provides opportunities for employees to influence proposals.
- Employees are aware of the probable impact of any changes to their jobs. If necessary, employees are given training to support any changes in their jobs.
- Employees are aware of timetables for changes.
- Employees have access to relevant support during changes.

Solutions

- Keep people informed at all times to alleviate fears and to prevent rumours.
- Ensure managers and employees are made aware of changes in advance – to allow adequate preparation time.
- Define and explain the key steps for change. Ensure employee consultation and support is a key element of the programme and that people understand and can work towards business objectives.
- Establish a system to communicate change and involve employees in the development of appropriate new procedures.
- Agree methods of communications (meetings, appraisals, notice boards, letters, e mail, feedback forums etc). Enable staff to comment and ask questions before, during and after the change.
- Explain the organisations objects, why change has to take place and the impact of the change on jobs.
- Try to make change an opportunity not a threat.
- In terms of major changes look at contracts of employment

(See Change Curve on page 45)

The Change Curve



Managing Change

Change Event

This major cause of stress can be avoided with forward planning, good communication and consultation channels and support for individuals and managers.

	Possible Behaviour	Support (to move forward)
Immobility	Competence can drop, people withdraw and there is a sense of inertia	Give reassurance
Denial	Carrying on regardless using old practices and processes, wasting time, head in the sand	Allow time to re-adjust, give encouragement and support when required
Frustration	Impatience and possible outbursts. Understanding the need for change but lacking information to carry out the new role	Be tolerant and give people the opportunity to express ideas and to try new ways of working
Acceptance	Explores new ways of working appropriate to the new situation	Give the opportunity to define personal identity
Development	Greater understanding of role and identification of knowledge and skills required	Training opportunities, new challenges and recognition of achievement
Application	Applies new skills, knowledge and understanding and gains confidence	Encouragement, empowerment, team building and other support as required
Completion	Acceptance - maximum competence, moving forward	Independence

Audit and Risk Assessment

Having secured the support of managers and employees - Carry out a stress risk assessment!

Identify the hazards - look at the six factors/standards identified by the HSE to find the causes of stress in your organisation. Familiarise yourself with the factors and think about how you can work towards them to improve your management practices.

Decide who might be harmed and how - elect a competent person to take the initiative forward and start collecting information.

Look at information already available:-

- Check on sickness absence which could identify problem hot spots.
- Look at productivity levels – are staff having problems which could be related to work-related stress.
- Do you have high turnover – why are people leaving. Exit interviews can be a good source of information.
- Appraisals can be a great opportunity to talk individually to employees about their job, what could be done better, how the job relates to other team roles and the organisation.
- Use team meetings or set up focus groups to get staff views on their role in the organisation.
- Conduct a staff survey – HSE have developed a questionnaire to help you (see section on Health and Safety and www.hse.gov.uk/stress/standards/downloads.htm for further information). The 35 question indicator tool looks at working conditions which could contribute to work-related stress and which correspond to the six factors identified by HSE. The survey can be used individually, for part of the workforce which is causing concern, or for the whole workforce. Results can be fed into the Analysis Tool on the HSE website and will give you average results for each stressor with a target figure to take you up to the top 20% of organisations in tackling work-related stress.
- Use your own survey which could include questions taken from the HSE questionnaire. However, the information gathered cannot be used with the Analysis Tool.
- Smaller organisations could use existing communication channels to get peoples views on working conditions.

Evaluate the risks and take action

Acknowledge that stress can affect any member of staff and ensure people are kept informed about developments. Look at data collected to help you formulate solutions which support all employees. Encourage employees to:-

- talk formally and informally to their manager.
- approach HR, Union Representatives and Health & Safety Officers with concerns.
- support each other.
- take advantage of counselling services or introduce an employee assistance programme.

Look at the HSE website for stress case studies and also case studies (included in this guide) from local organisations who have attended Warwickshire County Council's HSE Stress Management Workshops.

Record your findings – start developing an action plan using the tables provided on pages 49-54 and in consultation with staff groups.

Think about:-

- current procedures.
- problem areas.
- action required and by who.
- time scales/key milestones and dates.
- feedback to staff.
- how to monitor and review.

Monitor & Review – to ensure your actions to tackle stress are effective.

- Check your action plan – are you still on track?
- Evaluate the success of solutions – revisiting data originally collected ie What is happening in problem areas? Are there changes to sickness levels and staff morale? Has staff retention improved?
- Conduct a follow-up survey – give initiatives time to take effect.

HSE want you to make steady improvement in your management of stress. It is essential to identify and monitor problems in the workplace that could lead to work-related stress.

There is a wealth of additional information to help you on the HSE website <http://www.hse.gov.uk/stress/standards/downloads.htm>

HSE MANAGEMENT STANDARDS

A series of statements about good management practice, based on the following six risk factors. They are a means to measure success and progress in managing stress. The standards are not new legislation. They are intended to help employers meet their existing duties under the Health & Safety at Work Act and Managing Health & Safety at Work regulations.

FACTOR 1	DEMANDS – includes issues like workload, work patterns and work environment			
<ul style="list-style-type: none"> Employees indicate that they are able to cope with the demands of their jobs and 				
<ul style="list-style-type: none"> Systems are in place locally to respond to any individual concerns 				
What should be happening?	WHERE WE ARE NOW	ACTION REQUIRED	BY WHO	BY WHEN
The organisation provides employees with adequate and achievable demands in relation to the agreed hours of work.				
People's skills and abilities are matched to the job demands				
Jobs are designed to be within the capabilities of employees				
Employees' concerns about their work environment are addressed				

FACTOR 2	CONTROL – how much say the person has in the way they do their work				
<ul style="list-style-type: none"> Employees indicate that they are able to have a say about the way they do their work and 					
<ul style="list-style-type: none"> Systems are in place locally to respond to any individual concerns 					
What should be happening?	WHERE WE ARE NOW	ACTION REQUIRED	BY WHO	BY WHEN	
Where possible, employees have control over their pace of work					
Employees are encouraged to use their skills and initiative to do their work					
Where possible employees are encouraged to develop new skills to help them undertake new and challenging pieces of work					
The organisation encourages employees to develop their skills					
Employees have a say over when breaks can be taken					
Employees are consulted over their work patterns					

FACTOR 3	SUPPORT – includes the encouragement, sponsorship and resources provided by the organisation, line management and colleagues			
<ul style="list-style-type: none"> Employees indicate that they receive adequate information and support from their colleagues and superiors and 				
<ul style="list-style-type: none"> Systems are in place locally to respond to any individual concerns 				
What should be happening?	WHERE WE ARE NOW	ACTION REQUIRED	BY WHO	BY WHEN
The organisation has policies and procedures to adequately support employees				
Systems are in place to enable and encourage managers to support their staff				
Systems are in place to enable and encourage employees to support their colleagues				
Employees know what support is available and how and when to access it				
Employees know how to access the required resources to do their job				
Employees receive regular and constructive feedback				

FACTOR 4		RELATIONSHIPS – includes promoting positive working to avoid conflict and dealing with unacceptable behaviour			
<ul style="list-style-type: none"> Employees indicate that they are not subjected to unacceptable behaviours eg bullying at work and Systems are in place locally to respond to any individual concerns 					
What should be happening?	WHERE WE ARE NOW	ACTION REQUIRED	BY WHO	BY WHEN	
The organisation promotes positive behaviours at work to avoid conflict and ensure fairness					
Employees share information relevant to their work					
The organisation has agreed policies and procedures to prevent or resolve unacceptable behaviour					
Systems are in place to enable and encourage managers to deal with unacceptable behaviour					
Systems are in place to enable and encourage employees to report unacceptable behaviour					

FACTOR 5	ROLE – whether people understand their role within the organisation and whether the organisation ensures that they do not have conflicting roles			
<ul style="list-style-type: none"> • Employees indicate that they understand their role and responsibilities and • Systems are in place locally to respond to any individual concerns 				
What should be happening?	WHAT WE DO NOW	ACTION REQUIRED	BY WHO	BY WHEN
The organisation ensures that, as far as possible the different requirements it places upon employees are compatible				
The organisation provides information to enable employees to understand their role and responsibilities				
The organisation ensures that as far as possible the requirements it places upon employees are clear				
Systems are in place to enable employees to raise concerns about any uncertainties or conflicts they have in their role and responsibilities				

FACTOR 6	CHANGE – how organisational change (large or small) is managed and communicated in the organisation				
<ul style="list-style-type: none"> Employees indicate that the organisation engages them frequently when undergoing an organisational change and 					
<ul style="list-style-type: none"> Systems are in place locally to respond to any individual concerns 					
What should be happening?	WHERE WE ARE NOW	ACTION REQUIRED	BY WHO	BY WHEN	
The organisation provides employees with timely information to enable them to understand the reasons for proposed changes					
The organisation ensures adequate employee consultation on changes and provides opportunities for employees to influence proposals					
Employees are aware of the probable impact of any changes to their jobs. If necessary, employees are given training to support any changes in their job role					
Employees are aware of timetables for change					
Employees have access to relevant support during changes					

Worcester Acute Hospitals NHS Trust

Background

Worcestershire Acute Hospitals NHS Trust employs 5,000 staff, across three sites, in Worcester, Redditch and Kidderminster.

Following a staff survey linked to the Improving Working Lives Initiative a number of issues were identified which had resulted in low staff morale, increased sickness absence and stress. An action plan was developed to address the main problem areas of:-

- Poor communication
- Lack of uniformity in terms of access to flexible working
- Unacceptable behaviour
- Sickness and stress

In June 2005 a dedicated project officer was appointed to tackle problem areas and to encourage staff to adopt a healthier lifestyle. Attending a Warwickshire County Council workshop, on the Health & Safety Executive's (HSE) Management Standards for Work-related Stress, helped the project officer to introduce changes to combat these problems, adapting practical ideas gained from delegates on the course and using the six stress factors identified by the HSE.



New Practices and Procedures

Information on flexible working has since been made more accessible through a flexible working opportunities leaflet available to all staff and at induction and through the Trust's intranet. As a result, staff are more aware and know where they stand with their right to apply for flexible working.

Staff information days were introduced in 2007 on all three sites. These 'Heart and Soul' days are held throughout the year to promote good work life balance practices and to encourage staff to change their life for the better.

A programme of activities to improve staff wellbeing is now available which include belly dancing, pilates, yoga, aquarobics and lunchtime walks. Legal surgeries and pre-retirement courses also take place on a regular basis. These activities are well supported by staff and are proving extremely popular.

The most recent initiative is a two day programme on self care, piloted in August 2007, and initially targeting areas where sickness is seen to be above acceptable levels. It is hoped that this programme may be rolled out across the Trust to avoid potential sickness.

As well as the launch of the staff intranet, an internal Connect magazine and carer and childcare newsletters has improved communication between staff and management. Regular features in the magazine highlight good WLB practices that staff can follow as well as stress busting tips.

Worcester Acute Hospitals NHS Trust

To address issues, related to unacceptable behaviour, mentors have been identified to offer confidential support to staff. This initiative is having a positive effect on relationships within individual teams.

All policies are available in a folder and are promoted through the Trust's intranet. Managers are expected to be aware of and understand all new initiatives to enable them to fully support their staff. Finally a work-life balance toolkit has been developed which covers all the new initiatives and which

includes a section on Health and Wellbeing. This is available on CD-Rom and will allow managers and staff to access all available information.

Outcomes

As a result of the changes the Trust has benefited from increased staff morale, lower incidence of staff sickness due to stress, wider use of flexible working and better communication between staff and management.

Beiersdorf UK Ltd

Background

Beiersdorf is a leading international company of branded consumer products for skin and beauty care. Its brands include NIVEA the largest body care brand in the world. Beiersdorf UK Ltd employs 220 people with Headquarters in Birmingham, Logistics in Witton and Press Office in London.

The Policy and Employee Relations Manager joined the HR Department late 2004 at a time when there were concerns about levels of stress in the business. Instead of tackling this with stress courses for managers and employees, the organisation decided to adopt a different approach by focusing on wellbeing.

Managers already went through a programme of transformational leadership to help motivate employees and to develop good role models. This helped to establish a culture which was people centred, and encouraged employee involvement and empowerment.



The Policy & Employee Relations Manager wanted to explore how organisational and individual resilience could be designed into ways of working to mitigate the factors that lead to stress.

Attendance at a Warwickshire County Council's workshop, on the Health & Safety Executive's (HSE) Management Standards for Work-related Stress provided the tools to set a strategy in motion to enable the organisation and its employees to become more resilient. A wellbeing audit using the HSE Indicator Tool was conducted and 80% of employees returned the questionnaires.

Practices and Procedures

The Company has been based in Birmingham since July 2000 and the wellbeing audit has highlighted and supported activities which have been evolving since the Company was established.

In addition to the questionnaire focus groups, involving 34 people from different departments, were involved in gaining a deeper understanding of the survey results. Through the audit a number of cases of unacceptable behaviour had been identified and this was addressed in the focus groups. Employees felt able to talk about this and subsequently explored areas for improvement when their departments considered their action plans following the audit. As a result action can be taken and employees are aware of the policy which deals with relationships and intimidating behaviour.

Following analysis of the data obtained from the audit and focus groups, a report went to the Board of Directors and, with their full support the findings were communicated to everyone in the business. As a result departmental teams have explored the results and decided for themselves where they want to focus their attention.

- A presentation was made to individual departments and folders of information provided which included the full results of the Wellbeing Audit, details of the HSE Management Standards and action plan templates.
- Workshops open to all staff have been run to discuss and define core values – those of Integrity, Trust, Respect and Pride. Everyone is responsible for ensuring the core values live and breathe throughout the Company
- A Wellbeing Policy has been introduced, and an Employee Assistance Programme is available to all employees and members of their family who live with them. In addition a series of top tips have been published on the local Intranet which includes '20 ways to beat stress' and '25 top tips for caring managers'. Workplace Therapies are made available; Indian head massage, Reiki, neck and shoulder massage and nutritional advice.
- Flexible working opportunities for everyone have been introduced. Employees are allowed up to 3 day's paid compassionate/ bereavement leave per year and depending on the circumstances managers can use their discretion to extend this. A similar principle applies to emergency time off for dependants and employees are paid for up to one

week in a year. The Company recognises that these policies enable employees to use their annual holiday leave in ways that enable them to take time off to relax and feel refreshed when they return to work. In addition unpaid career breaks of up to six months are available with a qualifying period of two year's continuous service.

- An employee information Hub is available on the Company Intranet, that provides readily accessible information on topics such as pension schemes, healthcare, ways to beat stress and top tips for caring managers. Included is information about the Employee Assistance Programme and if required counselling is made available to employees who may need help in resolving personal issues.

Outcomes

The organisation continues to develop a culture of involvement and empowerment and is cognisant of the need to communicate and manage change.

Individual teams are empowered to develop action plans, to suit their team, using the HSE factors.

Managers have an understanding of the company's HR Policies & Procedures, the company's statutory obligations and how it's people strategy designs resilience into the organisation so that employees are better equipped to deal with workplace stress.

People feel well, are happy, and more productive.

Useful contacts for Work-Life Balance and Stress

<p>DTI</p> <p>Ministerial Correspondence Unit Department for Business, Enterprise & Regulatory Reform 1 Victoria Street London SW1H 0E</p>	<p>ACAS</p> <p>Warwick House 6 Highfield Road Edgbaston Birmingham B15 3ED</p>
<p>Tel: 020 7215 5000</p> <p>http://www.dti.gov.uk/employment/</p>	<p>Tel: 0121 456 5434</p> <p>http://www.acas.org.uk/</p>
<p>Employers for Work-Life Balance (The Work Foundation)</p> <p>The Work Foundation 21 Palmer Street London SW1H 0AD</p>	<p>Work Wise UK</p> <p>Winkworth House 83 St. Judes Road Englefield Green Surrey TW20 0DF</p>
<p>Tel: 020 7976 3500</p> <p>http://www.employersforwork-lifebalance.org.uk/</p>	<p>Tel: 01784 473005</p> <p>http://www.workwiseuk.org/</p>
<p>Working Families</p> <p>1-3 Berry Street London EC1V 0AA</p>	<p>Chartered Institute of Personnel Development (CIPD)</p> <p>151 The Broadway London SW19 1JQ</p>
<p>Tel: 020 7253 7243</p> <p>http://www.workingfamilies.org.uk/</p>	<p>Tel: 020 8612 6200</p> <p>http://www.cipd.co.uk/</p>
<p>Health & Safety Executive</p> <p>1 Hagley Road BIRMINGHAM B16 8HS</p>	<p>International Stress Management Association</p> <p>PO Box 26 South Petherton TA13 5WY</p>
<p>Tel: 0121 607 6200 Tel: 0845 345 0055 (advice on stress)</p> <p>http://www.hse.gov.uk/stress/index.htm</p>	<p>Tel: 07000 780430</p> <p>http://www.isma.org.uk/</p>