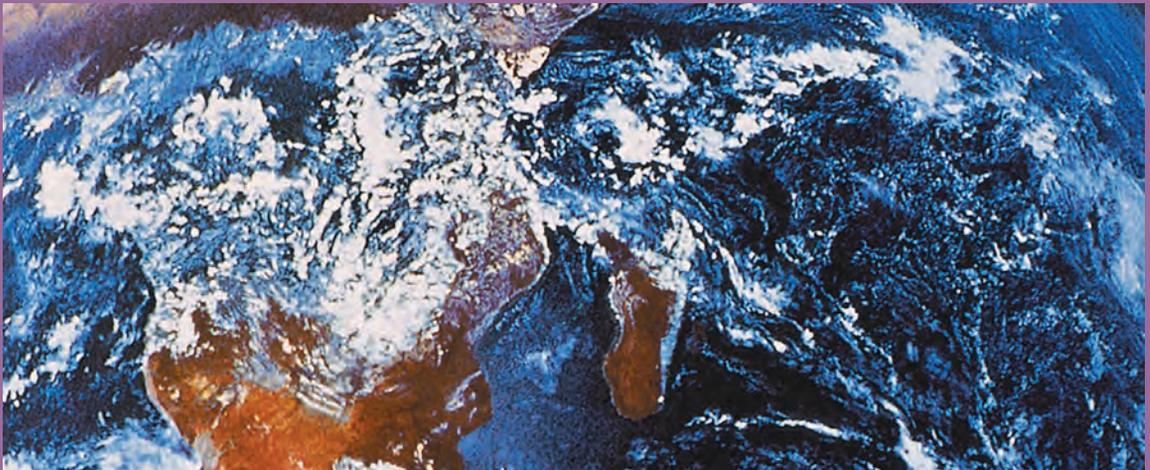


WORK-LIFE BALANCE



THE OBJECTIVES OF THIS CHAPTER ARE TO:

- 1 ANALYSE THE DRIVERS FOR WORK-LIFE BALANCE
- 2 OUTLINE THE LEGISLATIVE CONTEXT
- 3 EXPLORE A RANGE OF WORK-LIFE BALANCE PRACTICES
- 4 ASSESS THE BENEFITS OF WORK-LIFE BALANCE
- 5 ASSESS THE BARRIERS TO, AND PROBLEMS WITH, WORK-LIFE BALANCE

At this early stage in the twenty-first century there is increasing evidence that, for some, the value of work is changing. While the 1980s were characterised by the idea that 'lunch is for wimps', there has been a shift, perhaps encouraged by increasing work intensification and pressure, towards valuing a slower and gentler pace, which allows more room for personal interests, environment and family. In 2001 41 per cent of managers in an Institute of Management survey felt that the quality of working life had got worse over the last three years (Institute of Management 2001). In the 1990s the notion of 'downshifting' appeared, which has been described as swapping a life of total commitment to work and possible high rewards, for less demanding, or part-time work or self-employment, or a combination of the three. This notion has been considerably expanded to form a wide range of legitimate work options under the banner of work-life balance or work-life integration which is being supported by government initiatives and is a key issue, rather than a key practice, in organisations not only in the UK but across Europe, America and such Eastern countries as Japan.

DRIVERS FOR WORK-LIFE BALANCE

Much of the pressure for work-life balance policies originates from the changing demographic make-up of our potential workforce, changing social roles, the changing responsibilities of organisations and legislative pressure. Increasing numbers of women in the workforce wishing to combine family and work responsibilities is an obvious driver for what were initially called 'family-friendly' policies (Kodz *et al.* 2002) and which quickly became work-life balance policies. This legacy does cause some problems for the implementation of work-life balance as we discuss later. The ageing workforce is another demographic change which has raised the importance of work-life balance for employers. Older employees may wish to remain in work, but work fewer hours or different shift patterns. A recent study by the Royal College of Nursing (RCN) identified the large number of nurses, working very difficult shift patterns, over the age of 50 who were going to retire. Many of these nurses would have been prepared to stay on in work if they had access to shift patterns which allowed them a better work-life balance, or if they could work part-time at the same job level. Such is the level of concern that the government has sponsored a drive to improve work-life balance in the NHS (Mahoney 2002). In addition, the fact that people are living longer means that many employees or potential employees have caring responsibilities, not only for children, but also for elderly parents.

In a tight labour market with a shortage of needed skills employers are forced into developing policies which can attract and retain groups of workers who might previously have left the organisation. Lloyds TSB, for example, felt that to attract and retain the workers that they needed, they needed to demonstrate that they were a progressive employer in terms of work-life balance policies. IRS (2002) found that the most popular reasons for employers to introduce work-life balance policies were recruitment and retention. The importance of this issue is underlined by the fact that the government is encouraging work-life balance, and began a campaign for this in 2000.

A further influence is the need for employers to respond to what is now termed 'a 24/7 society'. Noon and Blyton (1997) argue that individual working hours are being decoupled from operating hours, and that more flexibility is needed to cover

round-the-clock peaks and troughs. They argue that this now applies to a much wider range of business areas than hotels, hospitals and continuous processes operations. Financial services and retail operations are now subject to similar pressures. There is much evidence of work intensification over the past two decades and this faster pace has been associated with much greater levels of stress in organisations. Holbeche and McCartney (2002) found that employees were experiencing anxiety, work overload, loss of control, pressure, long hours and insufficient personal time. Such experiences are likely to encourage a reassessment of values in workers, and there is also evidence that younger people entering the labour market are much less willing to sacrifice their personal lives for total commitment to work. Values and expectations appear to be changing.

Associated with such changes organisations have been facing, and sometimes losing, lawsuits in respect of stress resulting from work. From a legal perspective employers have a duty of care, so in terms of self-protection work-life balance measures have an attraction. On a more positive note there is some evidence that employers are more concerned about promoting a healthy working environment and are more aware of their social responsibilities as an employer.

In conjunction with David Blunkett, the Secretary of State for Education and Employment, the Employers for Work-life Balance Alliance was set up in 2000. It comprised 22 employers who exhibited good practice in work-life balance and served to offer advice to other organisations. The alliance has now disbanded but in its place Investors in People has developed a work-life balance model which offers guidance for employers.

ACTIVITY 32.1

'Work-life balance is just another fad. In a few years time it will be superseded by another issue.' To what extent do you agree with this statement and why?

THE LEGISLATIVE CONTEXT: FAMILY-FRIENDLY LAW

In recent years a significant contribution to the development of workplaces which offer a better work-life balance has been made by the government and by EU institutions. This has involved the introduction of new regulations which require employers to take account of the needs of people with family responsibilities as well as substantial improvements to existing statutory rights. Campaigners pressing for greater family-friendly working practices would like to see a much further extension of this kind of legal right, and this may well happen over time. For now though the government has chosen to take an incremental rather than a radical approach to policy development in this area, taking care to balance the interests of employees and employers. The major ways in which the law plays a part in promoting family-friendly working practices are set out in the following paragraphs. The Working Time Regulations 1998, which are also often reviewed in this context, were discussed in Chapter 22.

Ante-natal care

A well-established statute gives pregnant employees the right to take reasonable time off work to attend medical appointments connected with a pregnancy without losing any pay. The right is expressed as follows:

not to be unreasonably refused time off for the purposes of attending ante-natal care appointments.

This means that permission must be sought and gained before the leave is taken. There is no general right simply to leave the employers' premises and then later state that this was for the purposes of attending ante-natal care appointments. If an employer unreasonably refuses a request, a claim can be taken to an employment tribunal. In many cases the employer's action will constitute sex discrimination and will lead to compensation being awarded. More common are situations in which the time off is agreed to, but not on a paid basis, or in which employers insist that any 'lost' time is made up at a later date. In such cases the tribunals make an award equal to any salary that has been lost. A common situation in which an employer can reasonably refuse a request is where the woman concerned works on a part-time basis and could arrange her appointment at a time when she is not working.

Maternity leave

The right for a mother to take time off before, during and after her baby is born has applied for many years, but the UK's regulatory regime was altered significantly in 2000 and rights were extended further in 2003. The aims were both to increase the amount of time a woman could take off work for maternity reasons, and to simplify administrative requirements.

The new scheme specifies three different types of maternity leave:

- a ordinary maternity leave (OML);
- b compulsory maternity leave (CML);
- c additional maternity leave (AML).

OML applies only to employees but there is no qualifying period of service. It can last for up to 26 weeks (i.e. six months) and can start at any time within 11 weeks of the date that the baby is expected to be born. Unlike the old scheme, no information needs to be supplied to the employer in writing, nor are any statements of intentions about taking further leave or returning to work required. The woman must, however, inform her employer of the week in which she expects to have her baby and give three weeks' notice of her intention to take the leave. OML normally begins on the intended date (i.e. on the date the employee informed the employer that it would start), but it starts automatically at an earlier time if the baby arrives early or if the woman is absent for a pregnancy-related reason in the four weeks prior to the expected date of birth.

During OML the contract of employment continues in all respects except for pay. The woman is entitled to retain any contractual benefits such as company cars, portable computers and mobile phones, and her holidays continue to accrue. Any

health insurance provided by the employer is retained and all the general duties owed by employers to employees and vice versa continue (*see* Chapter 5). Moreover, there is a general right for the woman to return to the same job on the same terms and conditions following OML. All pay rises and other improvements to terms and conditions must be honoured so that after her return to work the contractual situation is as if the maternity leave had not occurred. The only exception is where the job becomes redundant during OML, in which case the right is to return to a suitable alternative job with similar terms and conditions. It is important to remember that the right is to return to the same *job* and not necessarily to the same *work*. It may be that changes have been made in her absence that mean the detailed work the woman does on her return may be somewhat different.

CML is straightforward. It is simply the two weeks after the birth, during which there is now a compulsory period of maternity leave. The onus is on the employer to make sure that no work is done during this period. Except in the case of very premature births, CML and OML overlap, so CML only applies where a woman decides she does not wish to exercise her right to OML.

AML can only be taken by employees who have completed 26 weeks' service with their employer at the fifteenth week prior to the date at which the baby is expected. It runs for a further 26 weeks following on from the end of OML, giving women in this position the right to take a full year of leave following a birth. However, the contractual position during OML and AML is wholly different. Unless the contract of employment states otherwise, terms and conditions of employment do not remain in place during AML. The only exceptions are notice provisions (on either side), redundancy compensation, the right to disciplinary and grievance procedures and basic duty of trust and confidence. In other respects the contract of employment is suspended during this time. Annual leave continues to accrue but only to the four weeks required by the Working Time Regulations. The right to return after AML is to the same job *if reasonably practicable*. Otherwise it is to a suitable job on no less favourable terms and conditions.

Whether a woman just takes OML or exercises her right to take AML, she is entitled to return to work before the full period of leave elapses, but to exercise this right she must give 21 days' notice to her employer. There is no longer any requirement to inform the employer in writing of a return to work after 26 weeks (or 52 weeks in the case of AML). The assumption must be that the woman will return at this time.

Maternity pay

Public sector employers as well as many larger companies continue to pay their employees during maternity leave, but this is not a legal requirement. Regulations specify only that Statutory Maternity Pay (SMP) is paid through the payroll to all those who are entitled to receive it. SMP is payable for 26 weeks (i.e. during OML) for employees who have completed 26 weeks' service with their employers at the fifteenth week prior to the week that the baby is due, and who earn more than the lower earnings limit for national insurance purposes (£77 a week in 2004). Women who do not qualify for SMP have to claim state maternity allowance from the Benefits Agency from the start of their leave.

SMP is paid at the 'higher rate' for the first six weeks (90 per cent of salary) and thereafter at the 'lower rate' (£100 per week in 2004). Employees continue to be paid at the 'higher rate', however, when it is lower than £100 per week. Employers can

claim a portion of their SMP payments back from the government through reduced future national insurance contributions.

Parental, paternity and adoption leave

European law gives both parents of a child the right to take up to 13 weeks' unpaid leave during the first five years of the child's life or during the five years following the adoption of a child. If the child is disabled, 18 weeks may be taken during the first 18 years of the child's life. In the UK this right currently only extends to *employees* who have completed a year's continuous service with their employer. It is only available to parents who have caring responsibilities for the child and the leave must be for the purpose of caring for that child. Interestingly, in this area of law, multiple births give multiple rights. So parents of triplets are entitled to take 39 weeks' leave.

As with the Working Time Regulations (*see* Chapter 22), employers may if they wish enter into a formal **workplace agreement** with their employees setting out how the principles of the law are to be applied locally. In the absence of such an agreement, a statutory default scheme applies which sets out how parental leave schemes should operate in practice. Included are clauses which restrict parents to a maximum of four weeks' parental leave per calendar year and which give a 'right to return' equivalent to that for additional maternity leave (AML).

In addition to the right to take unpaid parental leave, since April 2003 UK law has given fathers of new babies the right to take two weeks' paid paternity leave within the first 56 days of the birth. However, this only applies to employees who have been employed for six months, 14 weeks before the expected date of the birth. As with parental leave, only fathers who expect to have responsibility for the child's upbringing are eligible. Paternity leave is paid at the same rate as the lower rate of statutory maternity pay (SMP), while return-to-work arrangements and contractual entitlements are the same as those for ordinary maternity leave (OML). Here though, multiple births do not give multiple rights.

When parents adopt a child, only one is entitled to take full adoption leave on the same basis as the maternity leave scheme outlined above, with pay during the first six months. The other is then entitled to take unpaid parental leave and two weeks' paid adoption leave. The payment arrangements rules about entitlement, notification procedures and contractual entitlements are as for maternity and paternity leave respectively.

Time off for dependants

Further European law gives workers a right to take reasonable amounts of time off during working hours for urgent family reasons, employers being informed of the intention to take the leave 'as soon as is reasonably practicable'. The UK legislation which gives effect to the relevant directive dates from 2000. It specifies the following situations in which such leave can be taken:

- to provide assistance when a dependant falls ill, gives birth or is injured;
- to make arrangements for the provision of care for a dependant who is ill or injured;
- on the death of a dependant;

- due to unexpected disruption or termination of the arrangements for the care of a dependant;
- to deal with an incident involving a child during the time when an educational establishment has care of that child.

‘Dependants’ are defined as spouses, children, parents or people who live in the same household as the worker, but they only become ‘dependants’ once they rely on the worker for assistance when ill, either directly or through arrangements made with a third party. Tenants, lodgers and employees are specifically excluded. The term ‘reasonable’ is not defined in the Act, but guidance issued by the Department of Trade and Industry (DTI) suggests that it should not normally be more than two days (i.e. enough time to deal with an immediate crisis and arrange longer-term care). This law does not therefore give a parent the right to take weeks of time off to care for a child during the whole duration of an illness. As with ante-natal care, the right is not to have a reasonable request turned down, and over time the courts will have to determine what is and what is not reasonable. What, for example, should happen if the employer knows that a mother’s husband is unemployed and available to care for a sick child?

The right to request flexible working

Potentially, the most significant new family-friendly measure is the right to request flexible working. It goes some way to meeting the demands of campaigners that parents with child-rearing responsibilities should be able to work part time as a right, but it falls short of this position by some margin. The right is for parents of young children to request any form of flexible working, but it is likely to be used principally by women returning from maternity leave who would like to cut or alter their hours.

The regulations set out a procedure which requires the parent to write formally to their employer asking for a one-off change in terms and conditions, together with an explanation as to how the request could be accommodated in practice. The employer can turn the request down, but only if one of the following eight reasons applies:

- 1 burden of additional costs;
- 2 detrimental effect on ability to meet customer demand;
- 3 inability to reorganise work among existing staff;
- 4 inability to recruit additional staff;
- 5 detrimental impact on quality;
- 6 detrimental impact on performance;
- 7 insufficiency of work during the periods the employee proposes to work;
- 8 planned structural changes.

When a request is turned down, the employee has a right to make a formal appeal, but if this is unsuccessful must wait for a further year before being allowed to make another request to work flexibly. The grounds on which complaints can be made to an employment tribunal are narrow because the right is only to *make a request* to work flexibly. Tribunals are not empowered to reconsider employers’ decisions. So unless the employer fails to give the request proper or timely consideration or denies the right to an appeal, there are no grounds for legal action. However, it is likely that

this position will change in the future as a result of decisions in the courts. For this to happen a woman whose request for flexible working had been turned down would have to bring a test case using the new regulations in tandem with the established law of indirect sex discrimination. If she could successfully show that a requirement to work full time constituted a rule with which considerably more men could comply than women, it would follow that a refusal to grant her request amounted to an act of indirect sex discrimination (*see* Chapter 23). The employer might still be able to defend itself, but to do so it would have to show that its decision was objectively justifiable. In other words, it would have to justify its decision in some detail rather than simply to state that one of the eight grounds for refusing a request applied.

Debates about family-friendly legislation

Views are divided about how, and indeed whether, further extensions of the family-friendly rights outlined above would be justified. Some mooted changes are uncontroversial, such as allowing a couple to choose whether it is the mother or the father who exercises the right to take additional maternity leave (AML), but others are strongly resisted by employers' associations. These include paying women at the higher rate of SMP throughout ordinary maternity leave (OML), giving employees returning from maternity leave a legal right to work part time and requiring larger employers to provide access to crèche facilities. Many employers argue that such measures would unacceptably add to their costs and make them less competitive internationally. There is also evidence of growing discontent about such measures from employees who do not have families, and a fear that too much regulation of this kind actually serves to hinder rather than help women's employment prospects by acting as a 'disincentive to hiring women of prime child-bearing age' (Lea 2001, p. 57).

However, strong public policy arguments can also be put in favour of family-friendly legislation and these hold sway in current government circles. In short, it is believed that such measures are needed to provide gateways which allow parents (particularly mothers) to combine working with their family responsibilities and hence to put much needed skills and experience at the disposal of the economy. They also serve to encourage single mothers and those with unemployed partners to come off welfare benefits and to take up paid employment instead. Helping fathers to take a greater share of domestic responsibilities contributes to this aim as much as removing the barriers which discourage mothers from returning to work following a pregnancy. In a tight labour market, where skills shortages are common, a compelling case can thus be made for family-friendly regulation on purely economic grounds (*see* Collins 2002, pp. 454–5).

ACTIVITY 32.2

Where do you stand in this debate about family-friendly legislation? Does it serve to underpin economic prosperity or reduce international competitiveness? What further measures would you welcome and which would you oppose?



WORK-LIFE BALANCE PRACTICES

Work-life balance options focus on three different types of work flexibility. First, there is flexibility in terms of the number of hours worked; second, the exact timing of those hours; and, third, the location at which the work is carried out. Clearly some options may reflect all three types of flexibility. While the legislation only addresses the need of parents, there is a strong lobby for flexible work options to be potentially available for all employees. There are potentially many possible work-life balance options, and clearly not all of these options are appropriate for all jobs or employees, and employers will need to be convinced of the business benefits of any work-life balance option. In addition work-life balance will mean different things to different people, depending on their age, life circumstances, values, interests, personality and so on. At present flexible options are predominantly taken by women (IRS 2002). Table 32.1 lists the main options.

Table 32.1 Options for achieving work-life balance

Part-time	Term-time working	Unpaid leave
Flexitime	Job share	Unpaid sabbaticals
Compressed week	Self-rostering	Work from home
Annual hours	Shift swapping	

Some items on this list are self-evident, but others require an explanation. While flexitime has been used for some time the systems tended to be formal, with limits, and there is currently an emphasis on less formal approaches and a more ad hoc approach to flexible hours, with, for example, days off for urgent domestic issues and time made up later. Compressed hours allow an employee to work perhaps a nine-day fortnight by working a little extra each day to allow for one whole day off. Self-rostering has been used particularly in the health service and allows nursing teams to design shift patters and staffing around the demands of work (for example getting the right mix of skills on each shift and taking account of patient care needs) and their own needs. IDS (2000) has produced a useful volume containing case studies of six organisations explaining how each has implemented work-life balance.

WINDOW ON PRACTICE

Work-life balance at Lloyds TSB

Lloyds TSB has won praise for its work-life balance policies, and Rana (2002) highlights the key role of the line manager is being open to new ideas and coming up with a work-life solution to meet both individual and business needs. Lloyds TSB introduced Work Options in March 1999 and in 2002 just under 3,600 employees were working flexibly as a result of this. An important foundation of policy at Lloyds TSB is that applications to work flexibly are now 'reason neutral', as it was felt that taking a

reason into account forced managers into making value judgements. Now all that matters is making a viable business case.

Originally work-life balance policies were not embraced as fully as the bank would have liked; in particular men did not feel that it was legitimate to work flexibly and felt that doing so would damage their careers. This position is gradually improving and 16 per cent of those using work options are men and 18 per cent are managers.

However, there is still some way to go. A union representative explained that flexible options did not sit easily with the old culture of long hours and unclaimed overtime pay, and that employees were still inhibited in requesting flexibility. The representative was also concerned that staff shortages may limit the viability of many work options.

Source: Summarised from E. Rana (2002a) 'How does it really work in practice?' *The Guide to Work-life Balance*. London: CIPD.

Glynn *et al.* (2002) suggest that in fixed hours cultures, such as a supermarket, work-life balance policies which detail specific options for flexibility will help. In a long hours culture, like consultancy work, they argue that it is harder to achieve work-life balance, and a more viable option is to allow individuals more informal discretion to work their hours at the times and in the location that best suit business and personal needs.

There is some evidence that the public sector makes much better provision for work-life balance and Walton and Gaskell (2001) give some excellent examples of senior public sector employees working in a variety of flexible ways. Case 32.1 on the website focuses on the public sector.



WINDOW ON PRACTICE

Gap years for grown-ups

Saga Magazine (2003) reports on the increasing trend for those in their 50s and 60s to take off into the unknown for a gap year. While some of these may be retired, many are still in employment and are taking a year out, returning to work refreshed and with a new perspective on life with rediscovered drive and enthusiasm. Examples given in the article are individuals who feel they have had little freedom in the past due to work and family commitments, and want to do something while they are still fit and active.

There can be powerful advantages in the work environment from employers making such long periods of leave available, not only in retaining people who might otherwise give up their job, but as one of their interviewees explained, 'I don't bother with the trivia now. And I came back to my job far more resilient, resourceful and tolerant.'

BENEFITS OF WORK-LIFE BALANCE

Work-life balance practices have been shown in some instances to reduce absence (especially unplanned absence), raise morale and in increase levels of job satisfaction. Increased levels of performance have also been found as employees are less tired and so work more effectively when they are working. Kodz *et al.* (2002) in their research found that productivity and quality of work had both improved, as had staff retention and the ability to recruit staff. Perry-Smith and Blum (2000) found that bundles of work-life balance policies were related to higher organisational performance in a US survey of 527 firms. In the early 1970s the UK experienced some intensive industrial action which caused the government to introduce a three-day week throughout the economy, accompanied by regular power cuts to conserve energy. For that short period industrial production dipped by less than the 40 per cent that working hours were reduced. Control and choice are important characteristics of working life and Kodz *et al.* found that

there is increasing acceptance that choice, control and flexibility are important *in work*, that personal fulfilment is important *outside work*, and, further, that satisfaction *outside work may enhance employees' contribution to work*. (Kodz *et al.* 2002, p. 1, italics in original)

Sabbaticals in particular can give individuals space and time to develop in other ways. Davidson (2002) reports on Elan, an IT company, that funds sabbaticals for employees to develop in new ways if there is a possibility this can transfer back into the workplace. They have supported such interests as horse whispering, surfing, performance music and neuro-linguistic programming and argue that 'sabbaticals give people the security of knowing they have a job to return to, and they bring fresh ideas back into the workplace' (p. 37).

In a baseline study covering employers and employees, conducted by the Institute for Employment Research at the University of Warwick and IFF Research Ltd (Hogarth *et al.* 2001), 91 per cent of employers and 96 per cent of employees felt that people work better when they can balance their work with other aspects of their lives. Employers can also find that such policies can meet business needs for flexibility and can be a way of addressing diversity issues.

Some employers have argued that staff on shorter working hours are still producing the same amount of work that they did on full-time hours; however, this was found to be, at least in part, due to the fact they were working longer than part-time paid hours, as the Window on practice in the following section demonstrates.

Case 32.2 on the website presents two different perspectives on the value and importance of work-life balance.



BARRIERS TO, AND PROBLEMS WITH, WORK-LIFE BALANCE

The take-up gap

There is considerable evidence that the demand for flexible work options is much greater than the take-up so far, and this has been referred to as the take-up gap.

Hogarth (2001) reports that 47 per cent of employees not currently using flexitime would like to do so, and 35 per cent would like a compressed week. Some work-life balance strategies cost the organisation money and financial limits are set for such practices to be viable. The AA experienced difficulties in setting up teleworking at home. Productivity was greater than that of site-based staff, but in order to offset the cost of technology and infrastructure such workers had to be more than 1.5 times as productive as site staff. To gain such productivity tight management and measurement of home-based teleworkers is necessary (Bibby 2002).

Policies and some line managers may limit access to work-life balance to certain groups. There is evidence that some employers fail to have a strategic approach to work-life balance, but use such practices in a fire-fighting manner, to deal with situations when they reach breaking point (for example in a case study of a Further Education college, *see Glynn et al. 2002*).

WINDOW ON PRACTICE

Who is entitled to work-life balance? A cautionary tale

In a government office there is a work-life balance policy with a range of options available. The options, however, are seen as being available only for women with children and this is causing much resentment among other staff. One manager, however, arranged, informally, in a specific year to have Friday afternoons off so that she could take her disabled husband up to the Lake District, avoiding the stressful Friday evening rush hour. To do this she worked extra time every other day of the week to make up her full-time hours. There were no problems resulting from this arrangement. She requested that the arrangement should continue the following year, but was told that she now had to make a formal application. She did this and was turned down on the basis that it was not compatible with work demands, and that she was needed in the office on a Friday afternoon. Stunned by this the manager wrote back explaining that she had two children, and it was on this basis that she needed the Friday afternoon off. Her application was granted.

There is evidence in the literature that work-life balance requests for childcare reasons would be dealt with more favourably than requests on any other basis. The association that work-life balance practices have with women bringing up children creates two problems. The first is that work-life balance is 'ghettoised' (*see, for example, Rana 2002b*), as something done for women with children who are not interested in real careers. The second is that this causes alienation from the rest of the workforce who are not allowed these special privileges. In particular, working part time has been a popular option in combining work and other commitments, and yet there is considerable evidence that this limits career development (*see, for example, MacDermid et al. 2001*).

ACTIVITY 32.3

Discuss the following statement. To what extent do you agree or disagree with it, and why?

'Employees should be equally entitled to work-life balance options, as long as business needs are met. It doesn't matter whether the reason is childcare, the desire to engage in sports activities, do extra gardening, or just loll around on the sofa watching television.'



The take-up of work-life balance options is often equated with lack of commitment to one's career or to the organisation. In the baseline study Hogarth *et al.* (2001) found that two-thirds of male employees felt that their career prospects would be damaged if they worked part time, and CIPD (Rana 2002b) found strikingly similar results in their survey of work-life balance.

In addition there are many employees who are committed to full-time hours because financial commitments mean that they require full-time pay. This severely limits the type of flexibility that they feel is appropriate for themselves. Heavy workloads may prevent requests for flexible working, and where departments are inadequately staffed flexible options are severely curtailed. High levels of work, combined with pressure from the organisational culture may also have unexpected consequences for those employees opting to reduce their hours to part time from full time, as is shown in the Window on practice.

WINDOW ON PRACTICE

Unpaid work

Glynn *et al.* (2002) in their research for the Institute for Employment Studies found examples of individuals reducing their hours to part time, but actually continuing to work more like their original hours as the workload had not reduced. As one interviewee who had done this explained:

'I end up working almost full time, just not visibly in the office. I do it at home once the kids are in bed.'

Managers appeared to be aware of these situations, and one manager explained:

'she produces almost exactly the same amount, of the same quality, as when she was working full time . . . she feels she has to prove she's still committed . . . she's not actually working less, she's working the same but in a different location . . . at a different time . . . she's not being paid for it and her access to other benefits [is] reduced . . . I worry that it is not sustainable for her.'

Source: Summarised from: C. Glynn, I. Steinberg and C. McCartney (2002) *Work-life balance: The role of the manager*. Horsham: Roffey Park Institute.

Furthermore in many organisations individuals have to be proactive and come up with flexible solutions which meet business needs and this is difficult when there are few precedents and a lack of understanding of what is available or possible. In addition the majority of organisations in an IRS survey had no procedure for employees to use to request flexible working (IRS 2002).

The CIPD survey (Rana 2002b) reports that 74 per cent of respondents believed that working hours is not an indication of commitment, 84 per cent felt that individuals working part time were not less committed and 77 per cent believed that organisations should allow employees to attend to personal commitments in working time, and then make the time up. However, while these figures demonstrate that there have been some shifts in attitudes, culture remains a major barrier to take-up. Long hours cultures with early and late meetings are hard to shift. It is argued that more middle and senior manager role models are needed of flexible working and that there need to be work-life balance champions.

Managers' role in implementing work-life balance

Whether or not there is a work-life balance policy in existence, it is often line managers who will be the 'main arbiters of whether work-life balance policies become a reality . . . both by their attitudes and management practices' (Glynn *et al.* 2002, p. 5). The Work Foundation found that managers were the main barrier to introducing and implementing work-life balance policies (CIPD 2003). Managers have to manage performance targets of the team and often feel that flexible working damages this, and flexible working for some may mean higher workloads for others. There is a pressure on line managers to be fair and their decisions about who can work flexibly and in what way are under scrutiny and may result in a backlash. On top of this managers may receive a bonus for meeting team performance targets, which may be jeopardised by flexible working. MacDermid *et al.* (2001) found that managers had three concerns relating to employees working reduced hours. The first concerned helping employees develop professionally while not working full time, the second, what to do if more employees wanted to work reduced hours as it could be a nightmare to manage a host of different alternative work arrangements, and third, that some jobs were just not do-able on anything less than a full-time basis. Managing workers who are not visible (working at home for example) is a particular concern for line managers. Felstead *et al.* (2003) report the fear that working at home is a 'slacker's charter', but they also found that homeworkers themselves had fears about not being able easily to demonstrate their honesty, reliability and productivity. Some managed this by working more hours than they should in order to demonstrate greater output. To counteract this fear, managers in Felstead's study introduced new surveillance devices, set output targets and brought management into the home via home visits. Managers also felt that home working represented a potential threat to the integration of teams and the acceptance of corporate culture, and that it impeded the transmission of tacit knowledge. There is also a concern that only some employees have the characteristics to be successful homeworkers, and Felstead *et al.* (2003) develop this idea in some detail.

It is becoming apparent that a range of key management skills is needed in managing flexibility. For example Janman (2002) suggests that key skills are communication, empowerment, performance management and coaching. Glynn *et al.* (2002) are more specific in their recommendations. They suggest that line managers need to be

able to 'push back' work demands from other parts of the organisation which they feel are unrealistic; plan and schedule; delegate in a fair and equitable way and understand the capacity and skills of those who report directly to them. They suggest that it is important for managers to be able to crack down hard on individual breaches of trust without cracking down across the board.

The Work Foundation (CIPD 2003) suggests that implementing work-life balance requires managers to shift the way that they measure staff, requiring more effort in judging performance and output rather than time spent doing the job. Managers clearly have to learn how to manage at a distance. But all this needs to be supported by the organisational culture:

To thrive, work-life balance needs a supportive organizational culture that has sympathetic values and practices at its core. Arguably, training practitioners have one of the most important and strategic roles in creating and supporting that culture through imaginative and appropriate training programmes. (McCartney 2003, p. 39)

Unfortunately Kodtz *et al.* (2002) found that line managers felt abandoned and did not get the support that they needed.

McCartney goes on to give the example of Ford Europe which provides seminars related to work-life balance topics such as stress management, how individuals should manage their own working arrangements, maternity and returning to work and new fathers' workshops. Also reported is BT, which offers e-learning packages on skills to enable balance, optimising the performance of flexible teams and judging which roles are suitable for home working.

Limits on access to work-life balance

So far we have treated work-life balance as an option potentially available for a majority of employees, but this is not the case in reality. Felstead *et al.* (2003) reveal that the option to work at home is usually the privilege of the highly educated and/or people at the top of the organisational hierarchy. People in these jobs, they suggest, have considerably more influence over the work processes they are engaged in. They also report that although more women work at home than men, there are more men who have the choice to work at home. Nolan and Wood (2003) also note that work-life balance is not for the lower paid. They report that 5 per cent of such employees hold more than one job, and usually work in low-paid, low-status jobs in catering and personal services. A similar scene is painted by Polly Toynbee (2003). She also reports that many of these low-paid workers work for agencies and as such are distanced from the ultimate 'employer'. In these circumstances work-life balance policies are unlikely to be available in any case. Even working only for one employer Toynbee reports a hospital porter saying, 'you can't survive, not with a family, unless you do the long, long hours, unless you both work all the hours there are' (p. 59). Felstead *et al.* (2002) highlight an assumption in the work-life balance literature, which portrays working at home as always a 'good thing'. They argue that what is important is the *option* to work at home, as some people work at home doing low-paid unsatisfying jobs with no choice of work location, such conditions not necessarily being conducive to work-life balance.

White *et al.* (2003) argue that organisations are using flexibility to attempt to offset the damage being caused by high-performance work practices, but they argue that they are only enjoyed by a small proportion of the workforce at the moment, and in any case only have a small effect on the problem. They argue for more fundamental changes in working practices with safeguards to protect work-life balance, such as giving teams themselves the responsibility for addressing work-life balance issues when setting output targets for themselves.

Successful implementation of flexible working is a culture-change programme, one that has relatively distinct goals in terms of values and beliefs, processes and behaviours. Viewing flexible working as culture changes places the topic firmly on the strategic agenda. (Jarman 2002, p. 17)

Few organisations monitor and evaluate the take-up of work-life balance options or measure their costs and benefits (IRS 2002). However, McCartney (2003) found that in BT the company used an annual survey, web chats, career life planning discussions, and employee networks to do this.

SUMMARY PROPOSITIONS

- 32.1** Demographic factors, the changing composition of the workforce, recruitment and retention problems, work intensification and the 24-hour society are all drivers for work-life balance initiatives.
- 32.2** There is increasing legislation encouraging employers to support work-life balance, but the emphasis is on family-friendly measures, and not on work-life balance for all.
- 32.3** Work-life balance policies generally provide options around how many hours are worked, exactly when these hours are worked and where they are worked.
- 32.4** When employees are given some control over their work-life balance they are likely to be more satisfied with work, have greater commitment to work, be more productive and stay longer in the organisation.
- 32.5** Barriers to work-life balance include understaffing, line manager fears, worries about career damage and organisational culture.

GENERAL DISCUSSION TOPICS

- 1** It is important to measure the costs and benefits of work-life balance. In what ways could this be done?
- 2** Discuss a range of measures that could be taken in an organisation to help line managers manage work-life balance successfully.

FURTHER READING

Duggan, M. (2003) *Family-Friendly Policies: A handbook for employer and employee*. Welwyn Garden City: Emis Publishing

This book on family-friendly employment legislation is comprehensive and up to date.

Holder, R. and Bradshaw, B. (2002) *Balancing Work and Life*. London: Dorling Kindersley Ltd

This is a useful, practical handbook which focuses on the steps readers can take in order to balance their work life with other aspects of their life. The book guides the reader through exercises which help them to recognise what success means for them as a person, understand themselves better, make changes in their work life and sustain these. The emphasis is on issues that are within the individual's control whether or not the organisation has any work-life balance policy or flexible options available.

McColgan, A. (2000) 'Family Friendly Frolics: The Maternity and Parental Leave etc Regulations 1999', *Industrial Law Journal*, Vol. 29, No. 2

This provides a sharply critical and thought-provoking appraisal of the measures taken by the government. The author shows how the UK has a great deal further to go in terms of legal provision if parents here are to enjoy the kind of rights that are common in many other EU countries.

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An extensive range of additional materials, including multiple choice questions, answers to questions and links to useful websites can be found on the Human Resource Management Companion Website at www.pearsoned.co.uk/torrington.

