

Flexible Employment Options Project

Final Report



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The FEO team would like to express their gratitude to all the people who have assisted with the successful undertaking of this project. Our thanks go to the project partners who have supported this initiative and in particular all the members of the various departments who agreed to participate in the project as part of a pilot or control group.

1.0 INTRODUCTION

Early in 2000, the UK Government launched a Work-Life Balance Campaign, supported by a special unit established within the then Department for Education and Employment (DfEE). The campaign has several objectives, including raising employers' awareness of the business benefits of introducing policies and practices that encourage and assist employees to achieve a better balance between work and other activities in their lives. Central to the campaign is a belief that everyone can benefit from better work-life balance practices. In other words, the Government's contention is that good work-life balance policies should offer a win-win situation for employees and employers, leading to more motivated staff, easier recruitment, better retention and higher levels of productivity.

The Flexible Employment Options (FEO) project was developed as a response to this campaign and other factors within the workplace, with the overall purpose of considering ways in which flexible working could improve the longer-term attractiveness of employment and career opportunity within the HE sector. The major objective of the project was to develop employment practice that was better aligned to meet the challenges facing higher education, and which would therefore improve recruitment and retention performance and employee satisfaction.

One of the major strengths of the project lies in its application across the higher education sector, using collaborative links with colleagues from Canterbury Christ Church University College, De Montfort University, Staffordshire University and the University of Birmingham. All of these institutions agreed to participate in pilot schemes to test out the variability of flexible working options and to co-operate with the research elements of the project. Representatives from ACAS, HEFCE and the trades unions NATFHE and UNISON have also participated in the project via their membership of the Project Board, with an overview of the project as a whole.

2.0 CONTEXT/BUSINESS CASE

The FEO project was established in response to a range of increasingly significant workforce challenges impacting upon the HE sector, including new legislation giving parents the right to request more flexible working arrangements in order to enable them to have more control over how they organise their work and childcare commitments. The British Government recently introduced the Employment Act (2000) which includes a requirement for employers to give due consideration to flexible working arrangements proposed by individual employees who are parents of children under 6 years of age (or 18 in the case of children with disabilities). Current legislation affecting flexible working and the rights of certain employees is summarised in Appendix 1.

Secondly, a number of new strategies and key Government initiatives such as 'The Learning Age', the drive towards life-long learning, widening participation and access, as well as the development of foundation degrees have promoted the need to re-design key teaching and learning strategies, including how, when and where learning and teaching are delivered to students. These changes within the HE sector have a significant impact on support staff as well as academic staff.

Other factors within the workplace have been key drivers in the increased interest in flexible working. There are important demographic changes taking place in the workforce, including increasing numbers of women in paid employment. In 1971, there were twice as many men as women in the workforce, but on current projections, there will be almost equal numbers by 2011. Another significant factor is the ageing population that has led to a shrinking pool of younger people from which employers can recruit. In 1991, 44% of workers were aged under 35, as compared with 32% aged 45 and over. In contrast, by 2011, the under 35 age range will have shrunk to 35% and more than half of the workforce will be aged 45 or above (Labour Market Trends, 2000). The implications of these developments for employers are compounded by the fact that the largest group (aged 35 to 54) comprises the workers most likely to also have caring responsibilities (either dependent children or, increasingly, older relatives or even both). Although many of the arguments in support of flexible working policies have focused upon the needs of women, particularly those with caring responsibilities, men too are concerned about their ability to effectively balance their work and domestic commitments (Lewis and Lewis, 1996, Glynn, 1999). These factors are leading to greater demands from employees themselves for more work-life balance policies and practices.

Another key factor is changing employee expectations, particularly amongst younger people who tend to have somewhat different views of employment compared with their older colleagues. Research, particularly that undertaken by the Roffey Park Institute of Management, has confirmed that for many people (even the most ambitious and dynamic young people) work is now seen as just one of a number of important areas, instead of being the overriding priority as was frequently the case in the past. There is recognition on the part of younger employees that work is only one element of their total life experience, leading to increasing unwillingness to sacrifice satisfaction with other aspects of their lives to enhance their employment prospects (Glynn, 2000).

The challenge taken up by the FEO project was to consider ways in which flexible working could provide working arrangements that help employees within higher education, at different career stages and different times in their working lives, to better balance their responsibilities at work with their commitments outside work.

3.0 PROGRAMME OF WORK AND RESEARCH METHODOLOGY

The programme of work for the project was split into 4 key phases and the research methods used were changed to suit the nature of each phase. Throughout the life of the project current awareness was maintained by literature review and attendance at conferences on flexible working and work/life balance. In addition links were developed and maintained with recognised national specialist organisations.

The **first phase** was to assess need and map current practice, and this involved mainly secondary research. An audit of current practice within the HE sector was undertaken and, in addition, best practice within the HE and other sectors was identified. Separate reports covering this work have already been issued and disseminated. Work was undertaken to investigate relevant legislation and recognised codes of good practice, and again separate reports on these topics have been produced.

As part of the preparation for the **second phase**, primary research was carried out to gather data and compile a workforce profile for each pilot site which included key performance indicators. The main part of the second phase involved the identification of suitable flexible working options prior to the setting up the pilot schemes. This was done with regard to compliance with all relevant legislation, equal opportunity and equal access tests and codes of good practice. Consideration was given to the implications for terms and conditions of employment of staff, as appropriate, and in the context of the Bett report.

Following an evaluation of the research undertaken in first phase the following eight options were selected for trial:

- flexible working hours
- compressed hours
- seasonal hours
- part-time hours
- home-working
- unpaid leave
- staggered hours
- personalised annual leave

(Appendix 2 provides a definition of each of these options)

The project focused on improving the flexibility of working hours, working patterns and work location to help employees achieve a better balance between their work responsibilities and any personal commitments.

The scheme was designed to be open to **all** employees regardless of their employment status. However, all requests for a change of working pattern were considered in terms of the employers' requirements and priority was given to the needs of the organisation. One of the project's aims was to report on the benefits to employers of offering flexible working arrangements.

Each of the four partner institutions was asked to identify departments where the managers were willing to take part in the scheme. In total 21 departments took part (involving over 1000 employees) varying greatly in size and function and including both support staff and academic staff. Those departments identified as pilot groups were offered a range of flexible working arrangements throughout the duration of the pilot scheme while those departments identified as control groups were not offered any change to their current working arrangements. An audit of each department was carried out in order to assess the opportunities that staff had to access formal and informal flexible arrangements prior to the commencement of the pilot scheme.

The **third phase** of the project involved setting up pilot schemes across the four sites in a rolling programme. Each pilot group was given a full briefing about the scheme which included an opportunity to ask questions or raise concerns. On-going support and monitoring mechanisms were put in place and a support pack was given to each person eligible to take part in the pilot scheme. The pack included details on:

- Background information about the project
- A policy statement
- Guidelines for employees and managers
- A question and answer sheet
- Fact sheets on each of the eight options available
- Pilot scheme request forms; one for leave arrangements and one for flexible working arrangements. The forms required the employee to consider flexibility in terms of maintaining or improving their job role; how the institution could benefit from the change; identifying potential problems and solutions; monitoring and identifying possible warning signs that the arrangement was not working well.

All the pilot schemes ran for at least 12 months. The **fourth phase** of the project involved the evaluation of the pilot schemes and this is detailed in the next section.

3.1 Analysis Of The Pilot Scheme

The evaluation of the pilot scheme involved primary research and analysis using a variety of current techniques. Information was gathered through questionnaires and focus groups.

3.1.1 Quantitative data:

The majority of the data was analysed using SPSS (a statistical analysis software package). Each questionnaire was given a unique code to allow analysis by a range of factors (for example, institution, staff group, gender, department and also the type of option applied for) whilst maintaining confidentiality.

A number of questionnaires were designed for different purposes and aimed at different groups. They were therefore analysed in a variety of ways, as follows: –

Initial and Final questionnaire – these were sent to all employees involved in the pilot scheme, the Initial questionnaire at the start of the pilot scheme and the Final questionnaire at the end of the scheme. These were used to identify attitudes to and interest in flexible working and also to examine the effect on job satisfaction of offering flexible options. The role of the control groups was to provide a stable base of opinion from employees who had had no opportunity to work in a more flexible way for duration of the pilot scheme.

Interim questionnaire – these were sent to employees in the pilot groups only and were used to assess how the project was progressing at the mid-way stage, and to collect data on the effect of offering flexible options on both individual and team performance. This enabled the effect both on participants (those taking specific options) and non-participants to be analysed and compared. This questionnaire was also used to identify any issues raised within participating departments.

Managers' questionnaire – these were sent to pilot group line managers at the end of the project and the data from these was used to analyse the experiences of managers who had participated in the project; to compare how the managers thought the scheme had impacted upon their teams; and to understand if their perspective was different from that of the participants within the pilot groups.

Some questions used a 5 point response scale. The questions requiring respondents to opt for a particular response to a statement were analysed by examining the percentage of respondents indicating a positive response as opposed to those giving a negative response.

3.1.2 Qualitative research:

This research was mainly in the form of comments made by respondents in the various questionnaires, but also from comments made by pilot group participants in focus group sessions. These comments were used as indicators of employees' perceptions about flexible working in general, trialling new ways of working, and managing new ways of working. The qualitative research was also used to highlight key areas and issues for consideration within the next stage of the FEO project.

Confidentiality of respondents has been maintained throughout and where comments are quoted verbatim in the report, any reference to a particular institution or department has been removed.

3.1.3 Key Performance Indicators

The project research focused on establishing whether or not offering flexible working options had any effect on two key performance measures:

- a) Retention performance** – labour turnover rates and the proportion of women who returned to work following a period of maternity leave

- b) Health & sickness indicators** – sickness absence levels

Where it was possible to obtain data, these indicators were measured in the 12 months prior to the pilot schemes being established and also during the 12 months that the pilot schemes were running. Measures were taken for the pilot groups where flexible options were introduced and also for the control groups where no additional flexibility was offered.

a) Retention Performance

i) Labour turnover - two key labour turnover statistics were used:

Separation rate

The 'crude wastage method' or 'separation rate' was used as this is the most prevalent method of measuring turnover and therefore allows meaningful comparisons with other organisations to be made. This is calculated as follows:

$$\frac{\text{Number of leavers in set period} \times 100}{\text{Average Number employed in that period}}$$

Although this method does have some shortcomings, in that it takes no account of the characteristics of the workforce or their length of service, it can provide a useful figure to benchmark against.

Stability index

The stability index was also used to illustrate the extent to which the more experienced workforce is being retained. This is calculated as follows:

$$\frac{\text{Number of employees with one year's service (or more) now} \times 100}{\text{Total Number employed one year ago}}$$

ii) Women returning to work following maternity leave

Information was requested on how many women had taken maternity leave in a given period and how many of those had subsequently returned to work.

b) Health & sickness indicators

The two most commonly used measures for monitoring absence levels were investigated:

i) Lost time rate, which indicates the proportion of working time lost through sickness absence

$$\frac{\text{Total absence (hours or days) in the period} \times 100}{\text{Possible total (hours or days) available in the period}}$$

ii) Frequency rate, which indicates the average number of spells of absence per employee (irrespective of the length of each spell)

$$\frac{\text{Number of spells of absence in the period} \times 100}{\text{Number of employees in the period}}$$

4.0 RESULTS

The pilot schemes were used to assess the impact of introducing of flexible working arrangements into four HEI's. This section details the research results from these pilot schemes and the results are given under the following headings:

- 4.1 Initial questionnaire**
- 4.2 Final questionnaire and comparisons**
- 4.3 Interim questionnaire**
- 4.4 Manager questionnaire**
- 4.5 Key performance indicators**
- 4.6 Cost analysis**
- 4.7 Key Issues**

The following abbreviations are used throughout this section of the report:

- Birmingham refers to the University of Birmingham
- CCCUC refers to Canterbury Christ Church University College
- DMU refers to De Montfort University
- Staffordshire refers to Staffordshire University

For the staff groups:

- Academic refers to Academic and Research staff
- Management refers to Management/Professional/Academic Related staff
- Admin refers to Admin/Support Staff

The pilot scheme consisted of 1,244 employees, of which 542 (44%) were in the pilot groups (offered flexible options) and 682 (56%) were in the control groups (offered no additional flexibility).

4.1 **Initial Questionnaire**

The Initial questionnaire was sent to all employees in both the pilot and control groups at the start of the project. This questionnaire was split into 2 sections:

- Section A concerned basic information about respondents, including staff group; contract type; hours of work; length of service; gender; disability; ethnic group; caring responsibilities; journey time. This information was used to establish a baseline for the profile of the dataset, to analyse the data using a wide range of variables and to enable the team to compare the project sample with other known statistics.
- Section B investigated the importance that employees place on flexible working arrangements compared to other benefits and also the value that employees give to particular types of flexibility.

The rate of return was 55% overall (675 respondents), of which 314 (47% of the sample) were from pilot groups and 361 (53% of the sample) were from control groups.

4.1.1 **Comparison of sample profile to four partner institution profiles**

Staff Group

The sample included responses from 150 Academic staff (22.2%), 110 Management staff (16.3%), 401 Admin/Support staff (59.4%). Responses were received from a small number of other staff groups, but the numbers in these categories were too small to provide any data of statistical significance.

The workforce profiling of all four partner institutions undertaken at the start of the project indicated that the overall staff profile across these four HE institutions was made up of between 35% and 40% academic and research staff; between 37% and 47% administrative and support staff; and between 4% and 8% management (including academic related) staff groups. This meant that the project sample contained higher proportions of administrative and management staff and lower numbers of academic staff than the overall partner institution populations. This was due to the nature of the departments taking part in the project. The Staffordshire and Birmingham samples had a higher proportion of management and academic staff, while the administrative staff were more evenly spread between the four institutions and there were more academic staff in the control groups than the pilot groups.

In the project sample there were approximately equal numbers of male and female academic staff, but for the other groups there were quite wide differences. Of the management group, 37% of the respondents were male, while of the administrative group 14% were male. The sample had a higher number of female academic respondents than the overall profiling suggested, but lower numbers of male respondents in the management and administrative groups than the profiling figures suggested.

Contract type

Of the sample, 89.2% were on permanent contracts, with 10.7% on fixed term or temporary contracts. Only 1 respondent had a casual contract. This was on a par with the workforce profiling which gave percentages of between 78% and 82% for all but Birmingham, which had a higher percentage of staff on temporary or fixed term contracts. There were fewer casual staff in the project sample compared to the overall profiling group.

In the project sample, 13% of academic staff were on temporary contracts, 11% of management and 8% of administrative staff. Of the sample, 88% of the female respondents were on permanent contracts as opposed to 91% of male respondents.

Hours worked

81% of the sample worked full-time and 17.6% part-time. There were also 7 job sharers in the sample, equivalent to 1.4%, and all were female staff.

The overall profiling gave percentages of between 68% and 73% for full-time staff, compared to between 27% and 32% for part-time staff. There was a difference between the genders in the sample with 21.3% of female staff on part-time contracts, as opposed to 7.3% of men.

Length of service

The sample responses for length of service were 15.4% employed for less than 1 year, 21.3% between 1 and 3 years, 12.6% between 3 and 5 years, 24.6% between 5 and 10 years, and 25.9% had been employed for over 10 years, (0.2% gave no response). Therefore approximately half the sample had been employed for less than 5 years and half over 5 years, and of the latter, half had worked at the same institution for over 10 years (more than 25% of the whole sample). There was some variation between the figures for male and female respondents with only 24% of females in employment at the same institution for over 10 years, compared to 32% of males.

Gender

With 73.6% female respondents and 26.4% male respondents the sample included more female staff than male staff probably due to the nature of the departments taking parting the project. Many departments were administrative based and these traditionally have higher percentages of female staff. In the overall workforce profiling the figures for female staff in the four institutions ranged from 51% to 59%.

Disability

The number of people within the sample indicating a disability was small, (only 20 respondents out of 675) i.e. 3%. Figures for the working population in this country as a whole suggest that 20% of people have a disability (Office for National Statistics: Economic activity of disabled people by sex, 2002. Social Trends 33). Of the women in the sample, 1.8% indicated they had a disability and of the men in the sample, 6.2% indicated they had a disability.

Ethnic Group

More than 92% of the sample were white and only 2 respondents failed to answer this question. The 7.4% of staff indicating an ethnic group other than white was lower than the national figure of 9% (Office for National Statistics, 2001 census for England).

Caring responsibilities

A significant proportion of the sample (46%) had caring responsibilities: 13.9% with pre-school children, 28.6% with school age children, 6.5% an elderly person, 3.4% a person with a disability or long term illness, and 1.8% other. These categories are not mutually exclusive and 4.7% of the sample had both pre-school and school age children. The overlap between the other groups varied slightly but was in the region of 1%. This meant that approximately 1 in 15 employees was looking after an elderly person and 1 in 30 was caring for someone with a disability. The differences between male and female respondents caring for children were not significant, but twice as many females than males were looking after either an elderly person or someone with a disability.

These figures are indicators of how many people had caring responsibilities which may have impacted upon their preferred working patterns to minimise the stresses of juggling home and work.

Journey Time

Journey time was included in the questionnaire as it is frequently a significant factor in the desire for flexible working. The reduction of journey times, the avoidance of “rush hour”, and coping with difficult journeys and parking problems are also factors identified.

The figures were as follows: 17.8% had a journey time of less than 15 minutes, 36.6% between 15 and 30 minutes, 22.2% between 30 and 45 minutes, 12.1% between 45 minutes and an hour, and 11.3% travelled more than 1 hour each way.

Just over half the respondents had a journey time of half an hour or less (54.4%). In total more than 23% had a journey time in excess of 45 minutes each way, with little difference between the genders. Differences became evident when looking at a breakdown by institution. 15.5% of respondents from Birmingham indicated a journey of over an hour, whereas at the other 3 institutions approximately 7% responded in this category. A high percentage at DMU (23.0%) took 45 to 60 minutes, whereas the figure for Birmingham was 13.4%, and at the other 2 institutions the figures were much lower at approximately 8%. These differences reflect the location of the institutions concerned.

4.1.2 Flexible Working Arrangements

The questions in this section of the questionnaire were designed to discover differences between an employee’s ideal job conditions and those experienced in their current role. The respondents were asked to indicate on a 5 point scale the importance of certain factors relating to work. Questions on the importance of access to flexible working and work/life balance were also included.

a) Opportunities for flexible working

The results from this section show that in their ideal job over 81% consider the opportunity to work flexibly as either important or very important but only 58.3% of respondents described their current job as providing opportunities for flexible working either well or very well. 11.3% stated that their current job provided opportunities for flexibility either badly or very badly and only 4.4% felt that it was not very important or not important at all in their ideal job – see tables 1a and 1b overleaf.

How important is it to have opportunities for flexible working in your <u>ideal job</u>?	
Very important	33.9%
Important	47.4%
Makes no difference	13.3%
Not very important	2.8%
Not important at all	1.6%
No response	0.9%

Table 1a

How well does your <u>current job</u> provide opportunities for flexible working?	
Very well	16.1%
Well	42.2%
Neither well nor badly	28.7%
Badly	8.3%
Very badly	3.0%
No response	1.6%

Table 1b

The difference in the figures between current and ideal job suggests that institutions, although offering some flexibility, do not go far enough or are perhaps not offering the right flexibility to the right groups of people.

Gender

Breaking these figures down by gender suggests that more women (84.6%) than men (72.6%) consider opportunities for flexible working as very important or important in their ideal job and that more women (12.5%) than men (7.9%) feel that their current job does not provide enough opportunities for flexible working (response, 'badly' or 'very badly') – see tables 2a and 2b below.

How important is it to have opportunities for flexible working in your <u>ideal job</u>?		
	Male %	Female %
Very important	24.8	37.3
Important	47.8	47.3
Makes no difference	19.6	11.0
Not very important	2.8	2.8
Not important at all	3.9	0.8
No response	1.1	0.8

Table 2a

How well does your <u>current job</u> provide opportunities for flexible working?		
	Male %	Female %
Very well	20.2	14.7
Well	38.3	43.4
Neither well nor badly	30.9	28.0
Badly	4.0	9.8
Very badly	3.9	2.7
No response	2.2	1.4

Table 2b

Staff group

Across all 3 staff groups, current jobs do not provide as many opportunities for flexible working (combining either 'well' or 'very well' responses) as each group would like in their ideal job (combining either 'important' or 'very important' responses) – see tables 3a and 3b below.

How important is it to have opportunities for flexible working in your <u>ideal job</u>?			
	Academic	Mgt	Admin
Very important	33.3	24.5	36.4
Important	38.7	57.2	48.1
Makes no difference	16.6	12.7	12.5
Not very important	2.7	3.6	2.5
Not important at all	5.4	1.0	0.5
No response	3.3	1.0	0

Table 3a

How well does your <u>current job</u> provide opportunities for flexible working?			
	Academic	Mgt	Admin
Very well	17.3	12.7	16.4
Well	39.4	42.7	43.4
Neither well nor badly	31.3	29.1	28.2
Badly	4.7	8.1	9.5
Very badly	3.3	6.4	1.5
No response	4.0	1.0	1.0

Table 3b

The figures suggest that the Admin group have slightly more access to flexible working than the other groups (combining 'well' and 'very well' responses) although all 3 groups gave fairly similar responses. The figures also suggest that opportunities for flexible working are slightly more important to Admin staff than for the other staff groups in their ideal job.

b) Work –life balance

The questionnaire contained a statement question about work-life balance:

I am able to strike a good balance between my home and working life

12% strongly agreed that they had a good work/life balance, and a further 48% agreed, suggesting that in total 60% of staff achieve a good balance between home and work. 21% responded that they neither agreed nor disagreed with the statement. 15% disagreed and 4% strongly disagreed, so 1 in 5 people in the sample may have difficulties balancing home and work life – see figure 1 overleaf.

Good balance between home and working life

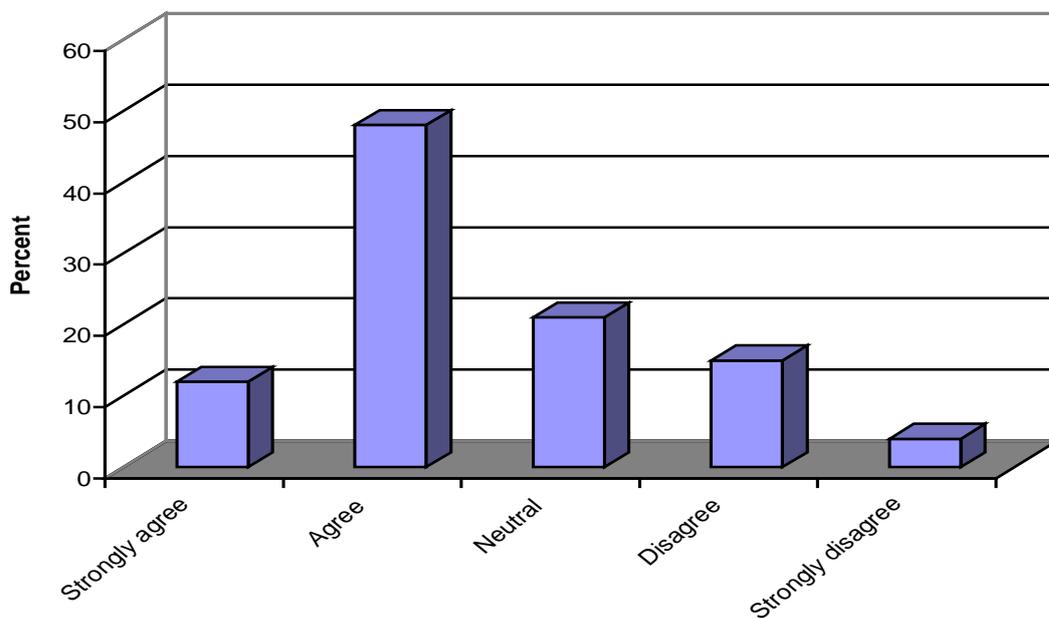


Figure 1

When split by pilot and control group the data shows that the control group includes slightly more respondents who disagree with the statement, but not a significant number – see figure 2 below.

Good home/work life balance - Initial questionnaire sample

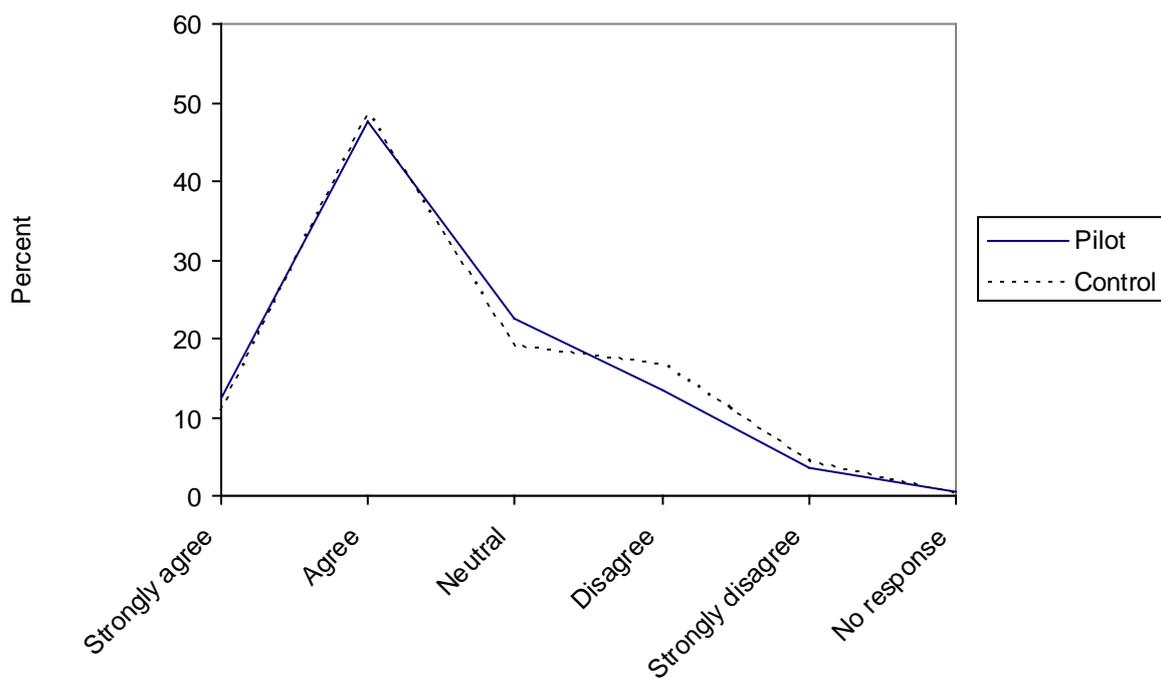


Figure 2

c) Value placed on specific types of flexible working

The next series of statements referred to particular aspects of flexible working. These questions did not always accurately capture information from those who already had some degree of flexibility and this affected particularly the responses from academic staff who already had a high degree of flexibility in the way they work. More responded with “not applicable” in this section than in any other.

i) I would value the opportunity to vary my hours on a daily basis according to my own preference (flexible working hours/staggered hours).

This question produced a very strong positive response with 40% of respondents strongly agreeing with this statement and a further 33% agreeing while 22% neither agreed nor disagreed, and only 3.5% disagreed or strongly disagreed. This supports the argument that working flexibly has wide appeal (over 70% of this sample) and is not just attractive to those with caring responsibilities.

ii) I would value the opportunity to vary my hours in order to assist with my childcare arrangements.

This produced a strong positive response with 20% indicating strongly agree and 10% indicating agree. A high percentage, 41%, neither agreed nor disagreed and 9% indicated not applicable. 11% disagreed or strongly disagreed. The profile of the sample showed that 38% had caring responsibilities for pre-school, school age children or both.

iii) I would value the opportunity to either sell some of my annual holiday entitlement or buy additional days (personalised annual leave).

22% strongly agreed with this statement and 28% agreed, with 31% neither agreeing nor disagreeing and 16% either disagreeing or strongly disagreeing. This suggests that nearly 50% of respondents would like a flexible annual holiday entitlement.

iv) I would value the opportunity to have a three-day weekend on a fortnightly basis in return for longer working days (compressed hours).

25% strongly agreed with this, and 26% agreed, which means that this working pattern appealed to just over half the respondents. 29% gave a neutral response and 18% either disagreed or strongly disagreed.

- v) **I would value the opportunity to work fewer hours at certain times of the year in return for working more hours at other times (seasonal hours).**
- 23% strongly agreed with this and 32% agreed. 29% were neutral with 13% indicating either disagree or strongly disagree. This response is backed by respondents' comments on the fact that they are busier at certain times of the year. Many Admin staff in the pilot may have workloads relating to the academic year, and so could potentially benefit from this form of flexible working. Many academic staff commented that they can already do this.
- vi) **I would value the opportunity to be able to reduce my hours of work at certain times during my career (reduced hours).**
- This statement had a strong positive response to it, with 25% strongly agreeing and a further 37% agreeing. 29% neither agreed nor disagreed and only 6% responded negatively. This form of flexible working has appeal for 63% of respondents which is more than the 46% with some form of caring responsibility.
- vii) **I would value the opportunity to reduce the number of hours I work gradually as I approach retirement (pre-retirement reduction).**
- This option appealed to 56% of respondents, with 19% strongly agreeing while 9% disagreed or strongly disagreed. 34% neither agreed nor disagreed, however, many also commented that they would like this opportunity provided it did not affect their pension.
- viii) **I would value the opportunity of working from home for a proportion of my working time, spending the remainder of the week at my usual workplace (home-working).**
- There were comments from many academic staff that they can already do this, but 63% either agreed or strongly agreed to this statement, with 24% giving a neutral response and 11% either disagreeing or strongly disagreeing.
- ix) **I would value the opportunity to be able to work during term-time only.**
- While 30% gave a negative response to this statement, 13%, or 1 in 8, strongly agreed with the statement, a further 15% agreed and 40% neither agreed nor disagreed.
- x) **I would value the opportunity to take a period of unpaid leave for personal or domestic reasons.**
- 60% of respondents gave a positive response to this, 28% neither agreed nor disagreed and 10% either disagreed or strongly disagreed.

Summary of value statements on flexible working issues

Table 4 and figure 3 below summarise the general response to each of the statements about how people would value the opportunity to use specific types of flexible working. The statements have been re-ordered to show the most positive response first.

The data shows that people would value flexible working hours the most, with opportunities for reduced hours of work and home-working also popular. Flexibility to assist with childcare arrangements and term-time working were of interest to the fewest staff although these figures were still significant at circa 30%.

Statement	Positive response	Neutral response*	Negative response
Flexible working hours	73%	23%	4%
Reduced hours	63%	31%	6%
Home-working	63%	26%	11%
W/L balance	60%	21%	19%
Unpaid leave	60%	30%	10%
Seasonal hours	56%	31%	13%
Pre-retirement reduction	56%	35%	9%
Personalised annual leave	51%	33%	16%
Compressed hours	51%	31%	18%
Childcare	30%	61%	11%
Term-time only	28%	42%	30%

*includes those who indicated not applicable and those who gave no response to the question.

Table 4

Response to flexible working statements

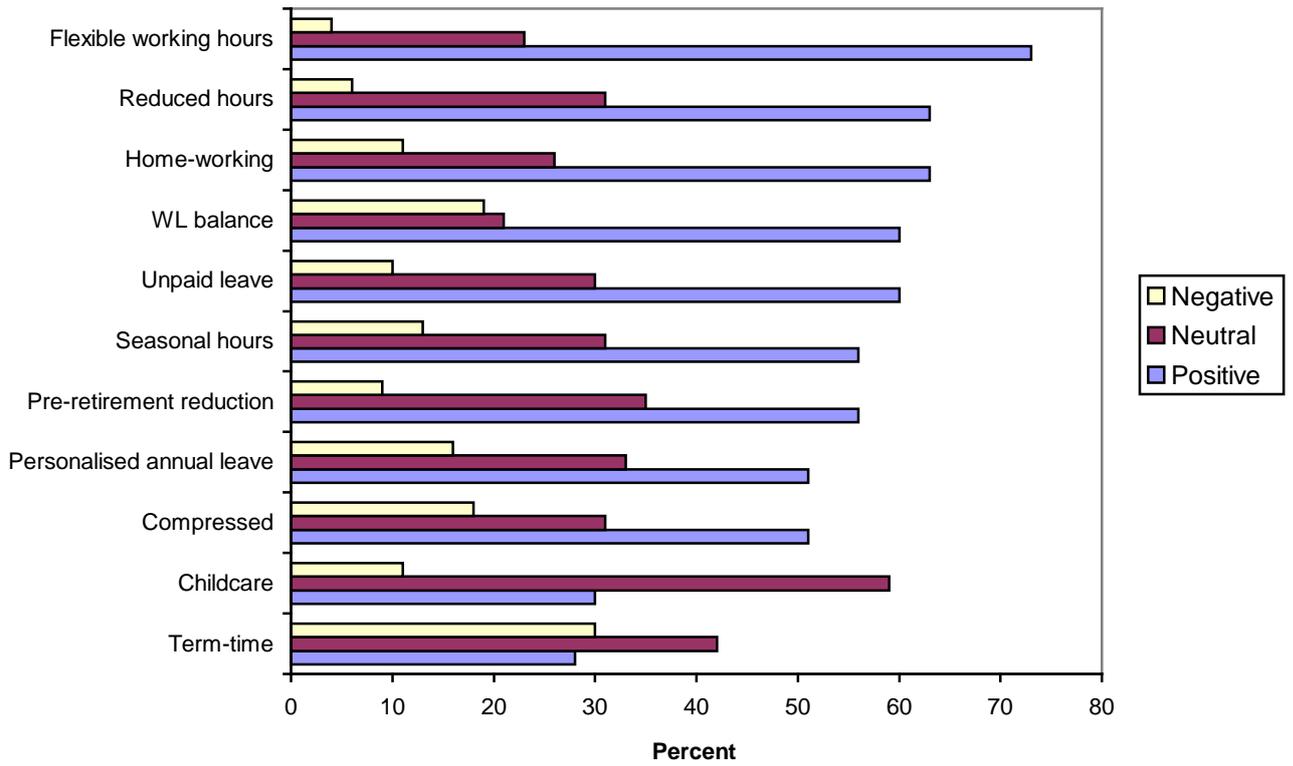


Figure 3

4.2 Final questionnaire and comparisons

The Final questionnaire was sent to all employees taking part in the pilot scheme both in the pilot and the control groups. Staff that had joined since the Initial questionnaire had been sent out were not included, and it was found that 158 employees (13%) had left the departments during the twelve to eighteen months of the pilot scheme, 70 from pilot groups and 88 from control groups. The overall return rate for the Final questionnaire was 47% (502 responses), with a similar split to the Initial questionnaire of 231 (46%) from a pilot group, and 271 (54%) from a control group.

The questionnaire was essentially the same as the Initial questionnaire and was designed to try to gauge any changes in response over the period of the scheme. However the questions concerning the value placed on types of flexible working were more detailed.

4.2.1 Sample profile

Overall the sample yielded similar responses to that of the Initial questionnaire –

- **Staff group:** Slightly more responses were received from Management staff (19%) offset by slightly fewer responses from Admin staff.
- **Contract type:** 96% were on permanent contracts and 4% on temporary or fixed-term contracts compared to 89% and 10.7% respectively at the start of the scheme, but the shift is to be expected as all staff in the sample had been in post more than 1 year. No-one was on a casual contract.
- **Hours of work:** There were fewer staff employed on a part time basis in this sample but an increased number of people employed in a job share.
- **Length of service:** 3 employees indicated that they had been in service for less than a year (these may have been new starters as the pilot was getting underway) and 60% of the sample had been employed by their institution for more than 5 years.
- **Gender:** The ratio of 71% female to 29% male was similar to the original sample but with slightly more male respondents.
- **Disability:** Again 3% of the sample indicated that they had a disability.
- **Ethnic group:** Again 92% of the sample described themselves as white.
- **Caring responsibility - preschool children:** 12.5% of the sample. (14% previously)

- **Caring responsibility - school age children:** 30% of the sample. (29% previously)
- **Caring responsibility – elderly:** 7% of the sample. (7% previously)
- **Caring responsibility – person with a disability/illness:** 4.4% of the sample. (3.4% previously)
- **Caring responsibility – other:** 3.4% of the sample (1.8% previously)
- **Journey time:** Very similar to the Initial questionnaire.

4.2.2 Issues investigated using the Initial and the Final questionnaires

As the profile of each of the 2 sets of responses was broadly similar this data was used to investigate any changes that the introduction of flexible working may have influenced and also to identify any differences in values between employees in the pilot and the control groups. The following section explores some of these issues.

a) **The desire for flexible working and current opportunities.**

Over the duration of the project the desire for flexible working in an ideal job has increased, although this may, in part, be attributable to the project raising the profile of the subject in the departments taking part in the scheme. The respondents to the Final questionnaire also answered more positively to the question concerning opportunities for flexible working in their current job. The figures suggest that institutions are still not offering enough flexible working opportunities to satisfy staff. The figures in tables 5a and 5b below are from the Final questionnaire.

How important is it to have opportunities for flexible working in your <u>ideal job</u>?	
Very important	40.2%
Important	44.2%
Makes no difference	11.6%
Not very important	2.4%
Not important at all	0.8%
No response	0.8%

Table 5a

How well does your <u>current job</u> provide opportunities for flexible working?	
Very well	27.7%
Well	36.9%
Neither well nor badly	22.1%
Badly	8.2%
Very badly	4.2%
No response	1.0%

Table 5b

Figures 4 and 5 below show the differences between the pilot and control groups at the end of the pilot scheme. Figure 4 illustrates that both sets of employees place a very similar level of importance on flexible working in their ideal job. However, figure 5 shows a significant difference in how well their current job provides opportunities for flexible working. As would be expected employees within the pilot groups who have access to more flexibility respond much more positively than employees from the control groups.

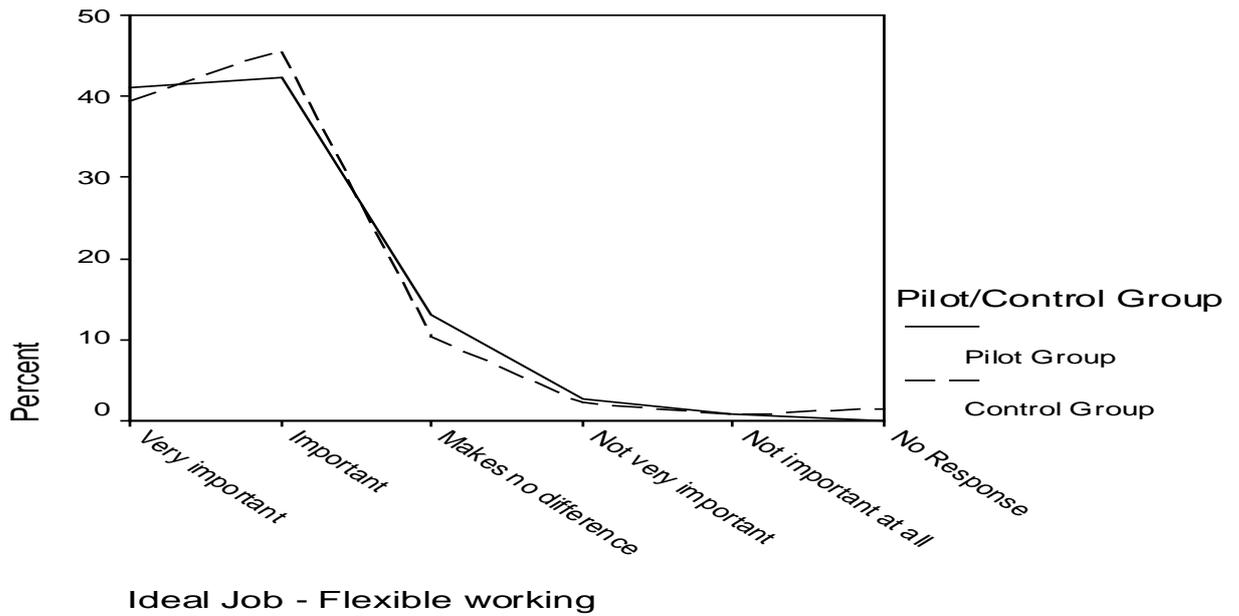


Figure 4

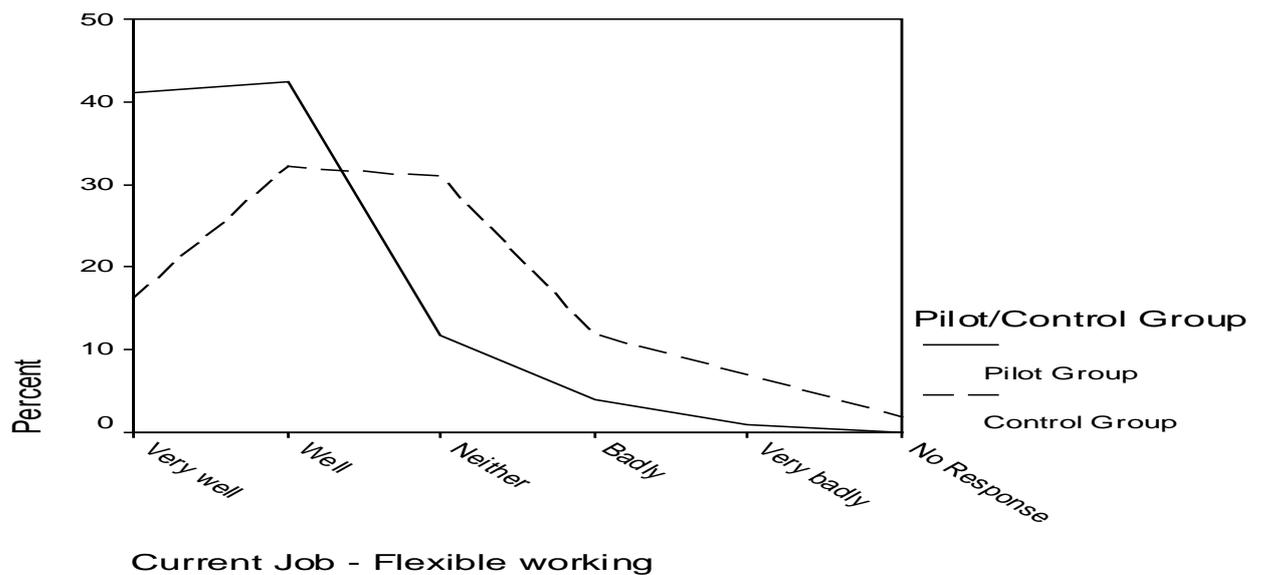


Figure 5

b) Job satisfaction

The overall satisfaction level for both the pilot and the control groups was slightly lower at the end of the pilot scheme compared to the overall satisfaction level at the start of the scheme.

Table 6 below shows the response of employees (categorised by the number of hours worked) to a question concerning their overall job satisfaction. These figures illustrate a more positive response from those working part-time hours or job-sharing than those working full-time. However the small numbers of job shares mean that the results for this group are unlikely to be statistically significant. The figures in the table below are from the Final questionnaire.

Hours of work	Positive Response	Neutral Response*	Negative Response
Full-time	70.3%	17.3%	12.4%
Part-time	82.7%	9.7%	7.6%
Job share	90.9%	0.0%	9.1%
Overall	72.9%	15.6%	11.5%

*Neutral response includes those who indicated 'not applicable' or gave no response

Table 6

c) Length of journey to/from work

Comments received from respondents indicated that one of the reasons for wanting more flexible ways of working was to help with the journey to or from work.

Journey time	> 15 mins	15-30 mins	30-45 mins	45-60 mins	< 1 hour
Positive response	79.0%	82.4%	83.9%	92.1%	95.8%
Neutral response	17.3%	11.3%	13.1%	5.9%	4.4%
Negative response	2.5%	5.6%	1.6%	2.0%	0.0%

Table 7

Table 7 above shows that as the journey time increases for an individual, the desire for flexible working in their ideal job also increases.

An examination of specific flexible options, particularly flexible working hours (flexitime) and home-working reinforces this point. The general trend (see table 8 below) shows that the longer the journey time the more positive the response to the possibility of being able to vary working hours on a daily basis or of being able to work from home occasionally.

Journey length	Flexible working hours	Home-working	Compressed hours
Under 15 mins	73%	52%	32%
15-30 mins	83%	61%	39%
30-45 mins	79%	59%	47%
45-60 mins	86%	67%	33%
Over 1 hour	91%	82%	51%

N.B. Figures show the % of those with a particular journey length giving a positive response to particular flexible options

Table 8

d) Caring responsibilities

The overall figures from the sample group show that approximately 80% of employees consider opportunities for flexible working as either very important or important in their ideal job. The number of carers in the sample group was 46% which illustrates that many more employees than just those with caring responsibilities are interested in working flexibly.

Table 9 below shows the percentage of respondents with caring responsibilities from both the Initial and Final questionnaire sample groups. It also shows some of the more significant overlaps where individuals have caring responsibility in more than one category. Both samples are very similar.

Caring responsibility	Pre-school	School-age	Elderly person	Disabled person	Both pre & school age	Both school & elderly	Both school & disabled
Initial	13.9%	28.6%	6.5%	3.4%	4.7%	1.2%	1.2%
Final	12.5%	30.1%	6.6%	4.4%	4.2%	2.6%	1.6%

Table 9

Further analysis of the makeup of the both the Initial and Final questionnaire samples suggests that approximately 75% of those indicating a caring responsibility are women and 25% men, except for those caring for an elderly person, where the ratio is approximately 82% female to 18% male. Those caring for preschool children make up approximately 13% of the samples, however, over 80% would like more opportunities for flexible working. In addition, while the percentage of men wanting more opportunities for flexible working is lower than that for women, 73% in the Initial questionnaire and 60% in the Final questionnaire, it is still well over half of the men in the 2 samples.

e) Analysis of options with low response rates

The overall interest in most options was over 50%, however, there were 2 options in which interest was lower (i.e. circa 30%); term-time only working and varying hours for childcare.

When the data is split by type of caring responsibility and valuing a particular option, the level of interest becomes clearer. Analysis of the value placed on the option to vary working hours to take account of childcare in the Final questionnaire sample shows that there is a great deal of interest in this option from carers of children, both pre-school and school age, as tables 10a and 10b below illustrate:

VARIATION IN HOURS FOR CHILDCARE		
Caring responsibilities –pre school	% positive response	% negative response
Non carers	37%	32%
Carers	94%	0%
Overall	44%	28%

Table 10a

VARIATION IN HOURS FOR CHILDCARE		
Caring responsibilities – school age	% positive response	% negative response
Non carers	30%	36%
Carers	78%	9%
Overall	44%	28%

Table 10b

The interest in term time only working seems just as great from those caring for pre-school children as those caring for school age children as illustrated in tables 11a and 11b below:

TERM TIME ONLY		
Caring responsibilities -preschool	% positive response	% negative response
Non carers	27%	32%
Carers	56%	21%
Overall	30%	30%

Table 11a

TERM TIME ONLY		
Caring responsibilities – school age	% positive response	% negative response
Non carers	24%	35%
Carers	44%	19%
Overall	30%	30%

Table 11b

Although these 2 options are not as popular in general terms, the tables above illustrate their importance to those people with caring responsibilities.

f) Positive effects on attitudes to other aspects of work

The data shows that employees within the pilot groups value the opportunity to work more flexibly and that the attitude of these employees towards some aspects of work is more positive than that of those employees from the control groups.

Table 12 overleaf gives the positive percentage response to each statement about work, and provides an opportunity to compare the response from the Initial questionnaire with that from the Final questionnaire for both the pilot and control groups:

Question	Initial questionnaire- Current Job % positive response		Final questionnaire- Current job % positive response	
	Pilot	Control	Pilot	Control
Friendly working atmosphere	86	78	88	81
Convenient work location	71	69	74	76
Job security	77	66	73	64
Interesting, enjoyable work	75	75	68	66
Good physical working environment	64	54	71	60
Opportunities for flexible working	69	49	84	48
Work that gives a sense of achievement	67	64	64	66
Good terms & conditions of employment	69	59	71	56
Working in an organisation with a good reputation	65	69	62	60
Opportunities for personal development	65	58	59	55
Recognition for the work I do	56	50	61	51
Working with young people	46	56	44	56
Fair pay for the work I do	53	35	46	36
Working in a "dynamic organisation"	36	32	36	28
Opportunities for promotion/career	36	30	30	28

Table 12

The positive response from the pilot group respondents towards opportunities for flexible working changed from 69% to 84% during the period of the pilot scheme whereas the positive response from the control group respondents remained virtually the same (48% and 49%). In addition, the pilot groups felt their terms and conditions had improved (up 2%), and that the work they did was recognised more (up 5%). All the issues are just as important to the control groups, as analysis of the response to the statements about Ideal job show, but overall they feel less positive about many aspects of their working lives. One of the contributing factors may be the lack of flexible options to enable them to balance their lives.

g) Work life balance

Results from the Initial questionnaire show that the pilot and control groups' responses to a question about work-life balance are virtually the same (see figure 6 below), although the control group are slightly more negative.

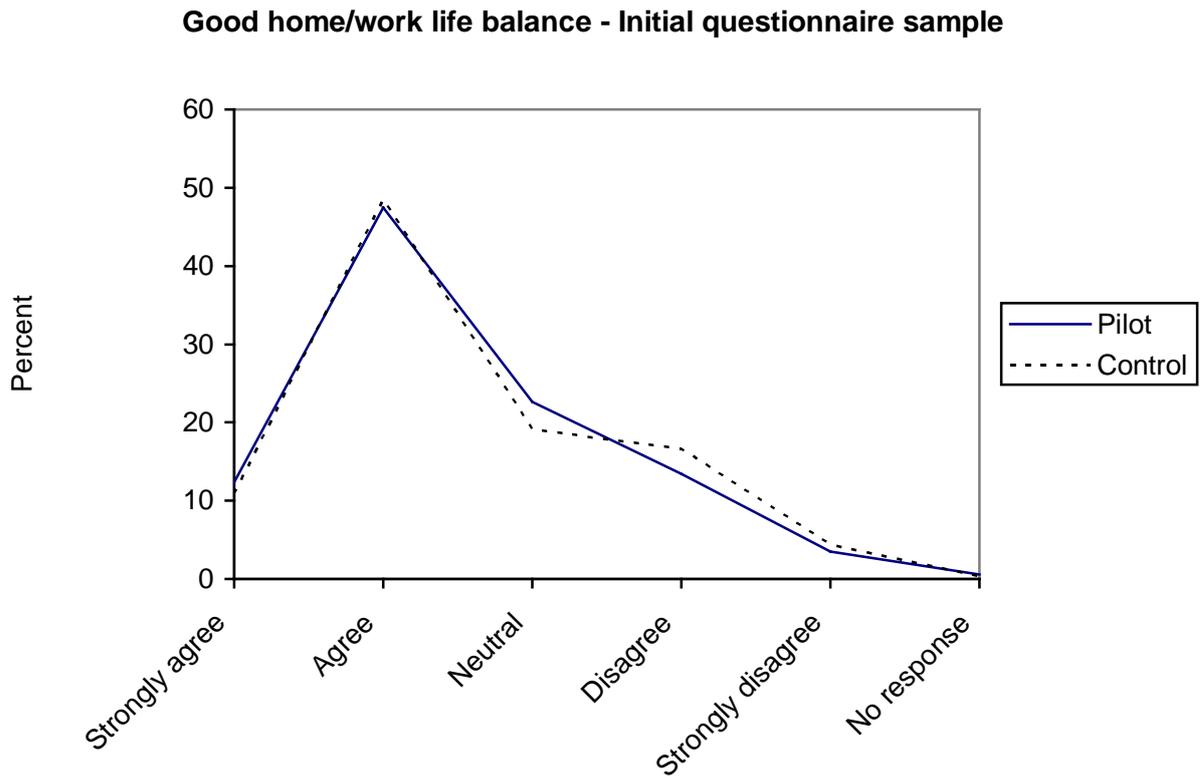


Figure 6

The results from the Final questionnaire show that the pilot group agree more strongly that they have a good work life balance (see figure 7 overleaf). It would appear that in taking up some of the flexible options on offer, employees in the pilot groups have been able to improve their work life balance.

Good home/work life balance - Final questionnaire sample

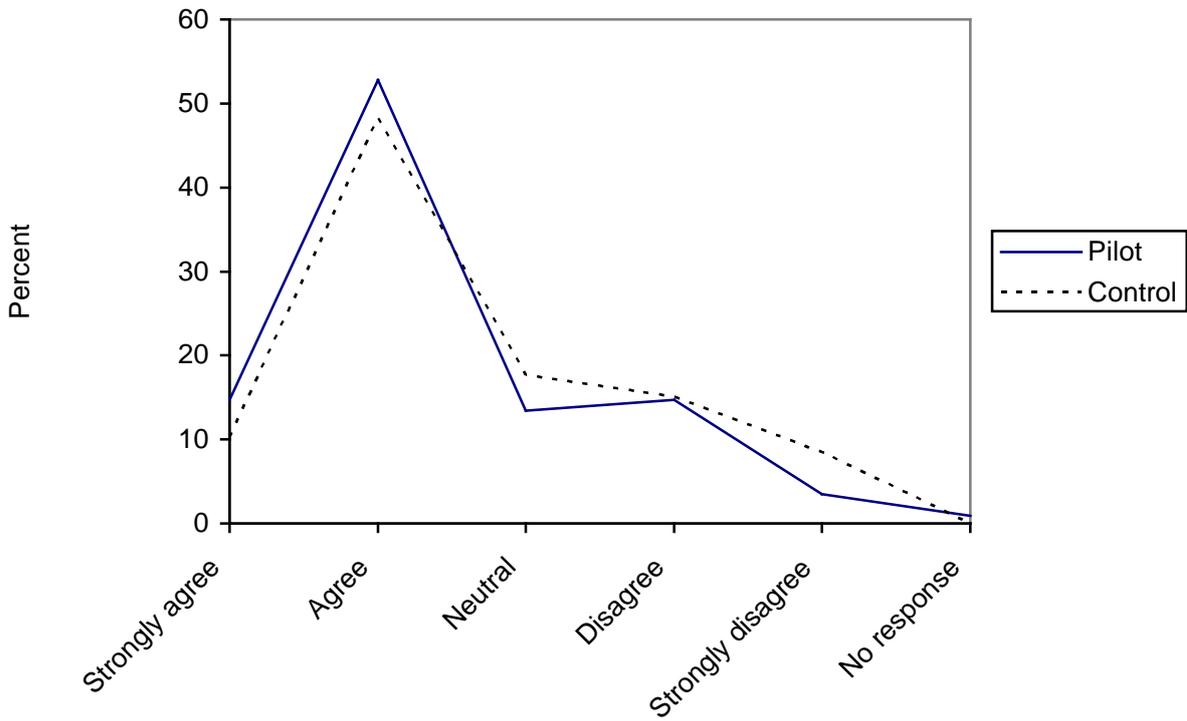


Figure 7

In order to investigate in more detail the experiences of employees in the pilot groups, an additional questionnaire was issued approximately half-way through the pilot scheme. The results of this Interim questionnaire are presented in the following section.

4.3 Interim Questionnaire

This questionnaire was issued to all employees (including managers) within the pilot groups and was designed to provide data to indicate how successful the scheme was from the employee perspective. The Interim questionnaire was issued part way through the pilot scheme and included all employees, both participants who actually took up an option and non-participants who declined the opportunity to request more flexible working arrangements. The return rate for this questionnaire was 45%.

Table 13 overleaf summarises the options that were applied for within each institution and provides details which were accepted and which were rejected by managers. The proportion of people applying for a flexible option was 21% of the total pilot group population.

The questionnaire asked employees within the pilot groups if the pilot scheme had been successful for them personally. It also explored the impact of the scheme on a range of personal factors such morale, productivity and customer service. The final part of the questionnaire examined the impact of the pilot scheme on aspects of team performance such as customer service, communication and productivity.

Institution	Option taken	Applied & accepted	Changes during pilot	Applied & rejected
STAFFS	Extended flexitime	31		
	Compressed hours	4	1 stopped after 6 months due to a reduction in team size 1 stopped - not successful for employee	3
	Working from home	3		
	Seasonal hours/com	1		
	Flexi/Reduced hrs	1		
	Unpaid leave	1		
	Temporary reduced hours	1		
	Sell annual leave			1 no funds
Total		42		
DMU	Compressed hours	5	1 changed to flexitime	
	Working from home	1		
	Flexitime	6	1 stopped due to car parking limitations*	
	Staggered hours	2	1 stopped due to car parking limitations*	
	Seasonal/flexitime	1		
	Seasonal/staggered	1		
	Home/staggered	1		
Total		17		
CCCUC	Flexible hours/ Flexitime	14	1 stopped due to workload**	1, then informally negotiated
	Compressed hours	2		
	Flexitime/Home	1		
	Jobshare/Home	1		
	Jobshare/Staggered	1		
	Staggered hours	1		
	Working from home	1		
Total		21		
B'HAM	Flexitime	15		1
	Compressed	6	1 changed to flexible hrs	
	Seasonal	2		
	Flexi/Compressed	2		
	Working from home	4		
	Home/Reduced hrs	1 (granted before pilot)		
	Home/Flexi	1		
	Staggered hours	3		
	Staggered/Flexi	1		
	Reduced hours	1		
Total		36		
Totals		116***	7	6

* unable to make use of flexible hours to drop children off at school before work due to lack of car parking spaces at later time.

** unable to use the scheme properly due to excessive workload at certain times. Not enough flexibility in the scheme to cope with accruing a large number of hours and taking leave at a later date.

*** 2 from academic staff, 114 from support staff

Table 13

a) **Impact of the Pilot Scheme on Individuals**

Personal success

A significant number of respondents from pilot groups felt that the scheme had been a personal success for them. More than 37% felt that it had been successful, whereas only 6% felt that it had not and 51% indicated that it had made no difference (the remaining 6% selected 'not applicable' or gave no response to this question). Of the 6% who felt it had not been a success, only 6 of the 14 had actually applied for any option. Of the 37% who felt it had been a personal success, 80% were employees who had taken up an option and 20% were employees who had not.

Morale

A significant minority (over 35%) believed that morale had either improved or greatly improved although more than half of respondents believed that it had not been affected by the scheme. Less than 4% believed that morale had been either reduced or greatly reduced.

Productivity

Over 21% believed that productivity had either improved or greatly improved. Fewer respondents however, felt that the scheme had impacted upon productivity, either negatively or positively with more than 68% believed productivity had been unaffected. Just 3 respondents (1.3%) believed that productivity had reduced, and no-one felt that it had greatly reduced.

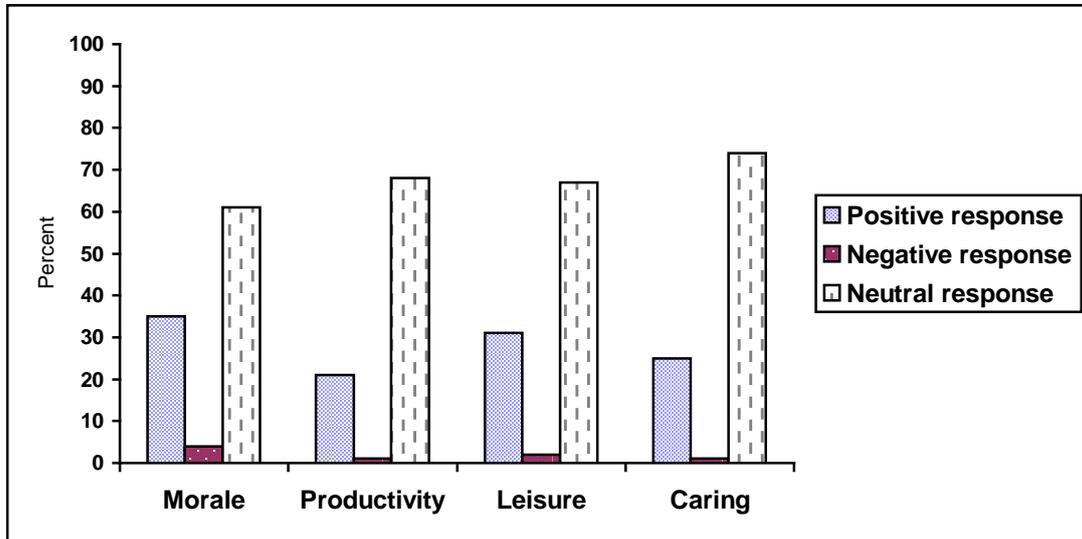
Ability to enjoy leisure/social opportunities

Respondents felt that their ability to enjoy leisure and/or social opportunities had been positively affected by the pilot scheme. Nearly 31% of respondents felt that this area of their life had either improved or greatly improved, whilst only 1.7% felt it had negatively affected them.

Accommodation of caring responsibilities

The pilot scheme also had a positive influence on respondents' ability to accommodate their caring responsibilities. More than a quarter (25.5%) felt that this had either improved or greatly improved, whereas only 2 respondents (0.9%) felt that the pilot scheme had reduced their ability to combine work with caring commitments.

Figure 8 below summarises the response to each question about the impact of the scheme on personal factors. This data illustrates that for the majority of respondents the impact of the scheme on all the above factors was felt to be either positive or to have no impact, very few respondents felt that the scheme had had a negative effect.



*Neutral response includes those who indicated 'not applicable' or gave no response

Figure 8

b) Impact of the Pilot Scheme upon Team Performance

Customer service

In spite of the concerns of some managers prior to the start of the scheme, respondents felt that the pilot scheme had had a positive impact upon customer service. Almost 1 in 5 respondents (18.3%) felt that customer service had either improved or greatly improved, compared with only 2.6% who felt it had reduced.

Office cover

There was more mixed response on the issue of office cover. Whilst 18.8% felt that office cover had either improved or greatly improved, 9.8% felt that it had reduced (although no-one indicated that it had greatly reduced).

Team Morale

Respondents believed that the impact on team morale was slightly greater than that on individuals. Almost 4 out of 10 respondents (38.7%) thought that morale had either improved or greatly improved, and only 2 people (less than 1%) believed that morale had been reduced.

Team productivity

As with the individual responses, although fewer people felt that the scheme had impacted upon team productivity, the results were positive. Almost 16% of respondents felt that the team's productivity had improved and a further 1.7% indicated that it had greatly improved. Of the remainder, more than 71% believed productivity had been unaffected, and only 1.7% felt that it had reduced, 9.8% gave no response or selected 'not applicable'.

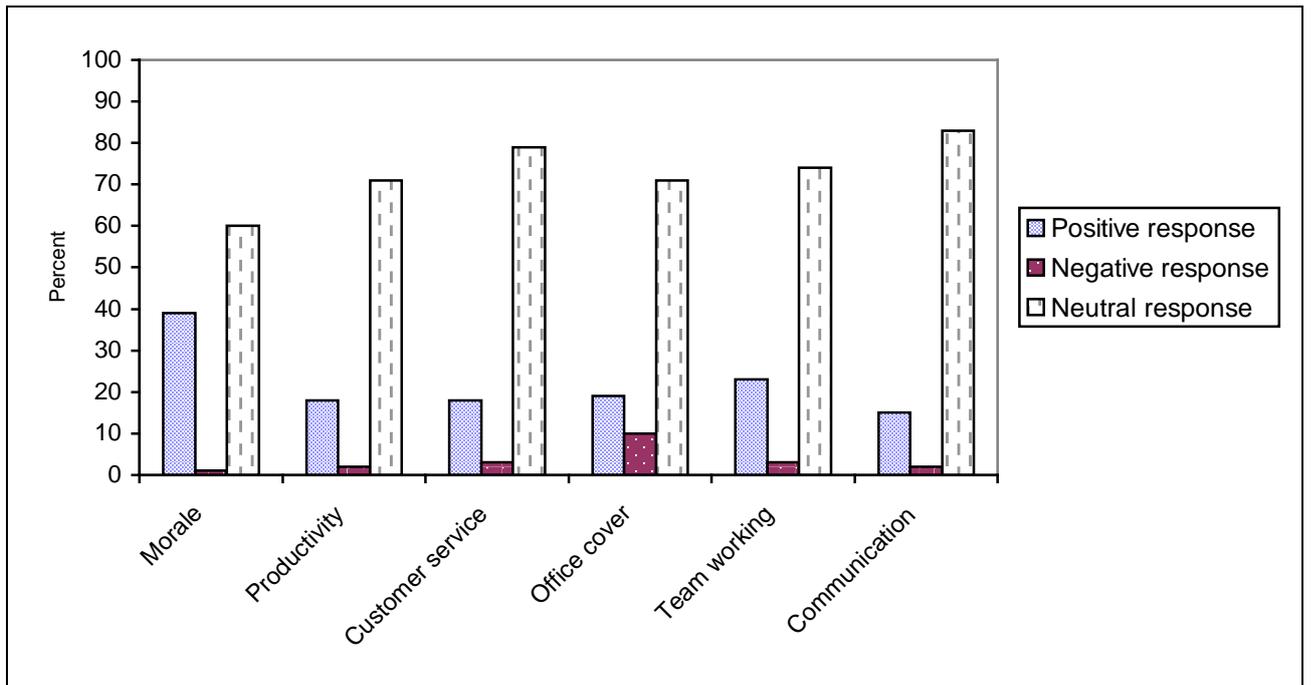
Team working

One of the concerns that some managers expressed prior to the start of the scheme was that team working would be damaged, due to staff working in a variety of different ways. They believed that there would be issues arising between people who took advantage of flexible working and those who did not, or that poorer communication would be detrimental to team working. This does not seem to be borne out by the responses from employees. Only 1 person felt that team working had been greatly reduced and a further 5 (a total of 2.5%) felt that it had been reduced. However, 21.4% of respondents believed that team working had improved, with a further 1.75% reporting that it had greatly improved.

Team communication

Similarly, whilst a small number of people (2.1%) felt that communication had reduced, 13.7% felt that it had improved and a further 1.7% felt that it had greatly improved.

Figure 9 overleaf summarises the response to each question about the impact of the scheme on team performance. This data illustrates that for the majority of respondents the impact of the scheme on all the above factors was perceived to be either positive or to have no impact, very few respondents felt that the scheme had had a negative effect. The most significant positive response was concerning improved team morale and the most significant negative response concerned a reduction in office cover.



*Neutral response includes those who indicated 'not applicable' or gave no response

Figure 9

4.4 **Manager Questionnaire**

The Manager questionnaires were distributed to every line manager within the pilot groups. Of the 57 questionnaires sent out, 33 questionnaires were completed, a return rate of 59%. Although this is a high rate of return, it is essential that caution is exercised in interpreting the results as this is a relatively small sample. However, some useful data was extrapolated from these questionnaires, and many of the findings confirm the outcomes of the other questionnaires. This questionnaire was, therefore, not only helpful for the purposes of triangulation, but also assisted the project team in identifying key issues for line managers for the development of the training programme in phase 2 of the project.

a) **Effect of the Pilot Scheme on a range of indicators**

The managers were asked to give their perception of how the pilot scheme had affected a range of indicators within the area for which they were directly responsible.

Customer Service

15% felt that customer service had improved while more than 60% felt that it had been unaffected. However, almost 1 in 10 respondents thought that this had been reduced and the remaining 15% gave no response. This finding was somewhat more negative than the findings from the Interim questionnaires, where almost 20% of respondents thought that customer service had either improved or greatly improved, and only 2.6% felt that it had reduced.

Office Cover

On the question of office cover, as with the Interim questionnaires, there was a more mixed picture. Although 3% of respondents felt that this had greatly improved and a further 27.3% felt it had improved, 18.2% of the group felt that it had reduced.

Staff Morale

Staff morale is one of the key areas of the business case for the introduction of flexible working, and managers were firmly of the opinion that this had improved. Almost 67% of respondents reported that morale had either improved or greatly improved, whereas only 6.1% felt it had decreased. This is a considerably more positive response than in the Interim survey, which found that the percentages who believed that morale in individuals and teams had either improved or greatly improved were 35% and 38.7% respectively.

Staff productivity

Managers also responded positively on the matter of staff productivity. None of them felt that productivity had been reduced, although more than half felt it had been unaffected. However, more than 27% believed that productivity had either improved or greatly improved. Once again, managers were more positive than staff as a whole where 21% believed productivity had either improved or greatly improved in individuals, and 17% believed this was the case with team performance.

Retention of staff

Retention of staff is another important consideration in the introduction of flexible working, and managers also responded positively to this question, with more than 24% believing that retention had improved or greatly improved. 61% believed it was unaffected and 15% gave no response.

Team working

In spite of some concerns expressed prior to the start of the scheme, more than 21% of respondents believed that team working had either improved or greatly improved. However, a further 12.1% believed that team working had been reduced.

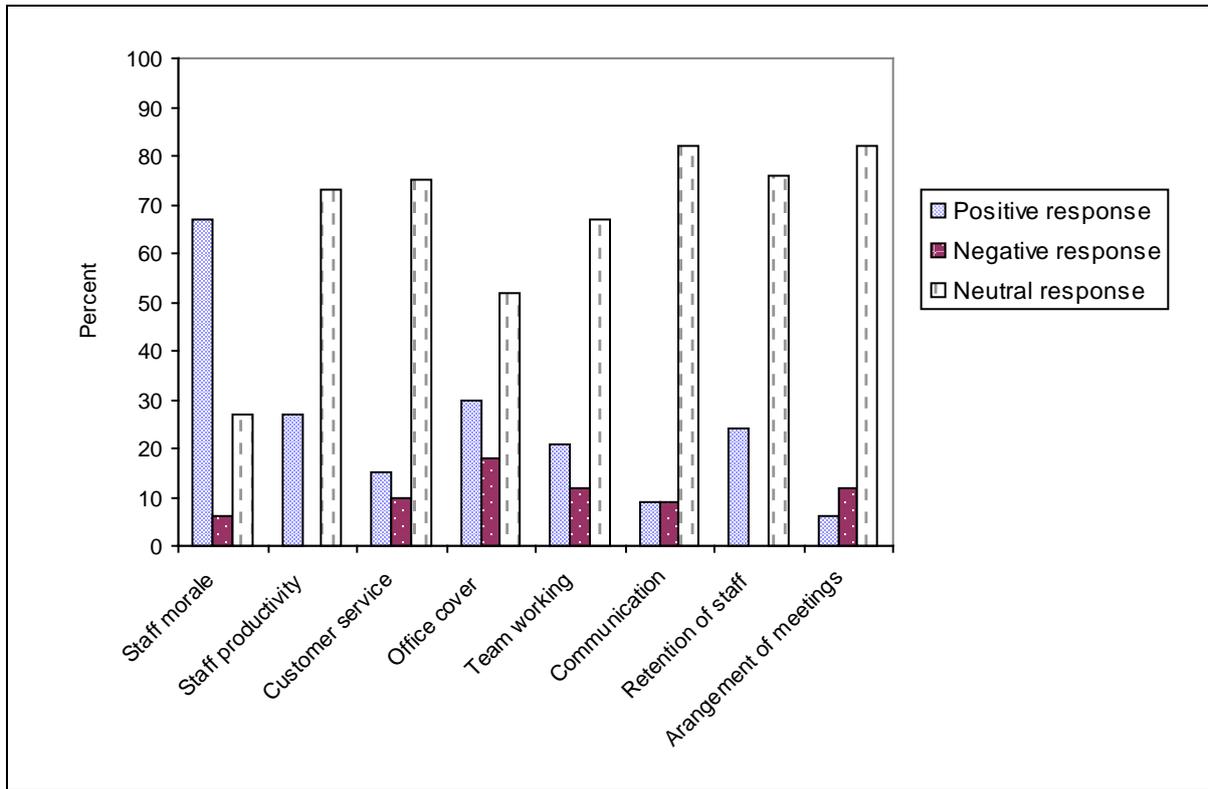
Team communication

An equal number of respondents (9.1%) believed that team communication had been reduced, as compared with those who believed it had improved or greatly improved.

Arrangement of meetings

Arrangement of meetings was regarded as more problematic, with 12.1% reporting that this had been either reduced or greatly reduced and only 6.1% noting improvements in this area.

Figure 10 overleaf summarises the response from line managers to each question about the impact of the scheme on their team's performance. This data illustrates that for the majority of managers the impact of the scheme on all the above factors was generally very positive or neutral. The most significant positive response concerned improved team morale and the most significant negative response concerned a reduction in office cover which reflects the views of the individuals taking part (see figure 9 on p 39).



*Neutral response includes those who indicated 'not applicable' or gave no response

Figure 10

b) Success of particular options

Managers were requested to report on their perception of the success of particular options offered within the scheme and, in line with other national surveys, the option perceived as most successful was flexitime. Compressed hours was the only option considered unsuccessful and this was the opinion of just one manager (3% of the sample).

Nearly half of the managers regarded flexitime as very successful and a further 15.2% reported it was successful, with less than 10% neutral.

Part-time working, one of the most popular forms of flexible working in the DfEE baseline survey, was also favourably regarded. More than 21% of respondents considered that this option had been very successful, and a further 6.1% considered it had been successful. However, 63.6% of respondents either failed to answer this question or reported that it was not applicable.

Home-working was not applicable to a large number of respondents (57.6%), but was reported as being either successful or very successful by 12.1% of respondents. As this option was one of the more radical, it was anticipated that it would not be likely to be implemented to the same extent as some of the other options available.

Table 14 below shows a summary of how successful each option was perceived to be by line managers:

Flexible option	Very successful %	Successful %	Neutral %	Unsuccessful %	Not applicable %	No response %
Flexitime	49	15	9		6	21
Part-time	21	6	9		43	21
Home-working	3	9	6		58	24
Compressed hours	15	9	9	3	40	24
Seasonal hours	12	6	6		49	27
Staggered hours	9	3	3		58	27
Unpaid leave			6		64	30
Personalised annual leave			6		67	27

Table 14

c) Overall Success of the Pilot Scheme for the team

Managers were asked to indicate how successful the pilot scheme was within their team. 51.5% felt it had been very successful or successful while 21.2% felt it had had no impact either positively or negatively and no managers felt the scheme had been unsuccessful – see figure 11 below.

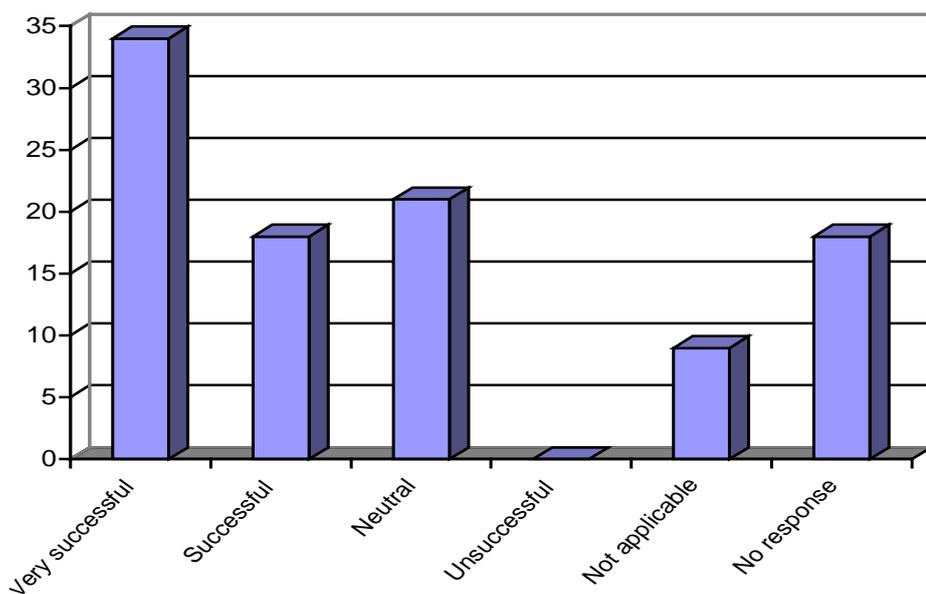


Figure 11

4.5 **Key Performance Indicators**

The aim of this aspect of the research was to try and establish if the introduction of flexible working arrangements had any impact on retention of staff or absence levels. This proved difficult to measure for several reasons:

- A number of departments involved in the pilot schemes were re-structured while the pilot schemes were running, making an accurate analysis of turnover and absence levels from computerised systems impossible to achieve.
- Some institutions were unable to provide any data for some of the indicators due to the limitations of their recording systems.
- Where institutions were able to provide data it was not always possible to do so in the format requested, making comparisons difficult.
- This type of data needs to be collected over a long period of time both before and after introducing a new variable i.e. flexible working options; this was not possible due to the time restrictions of the project.

4.5.1 **Retention Performance**

Separation rate

Examining the data from the pilot group and control group populations across all 4 institutions shows that the separation rate increased from 10.1% to 12.3% in the pilot group population and from 11.9% to 13.5% in the control group population. This is an increase of +2.2 and +2.0 respectively i.e. in both populations there was a slight increase in turnover during the year that the pilot schemes were running compared to the previous year. As the same increase occurred in both populations it would appear that, from the limited data available, the introduction of flexible working options had no significant impact on turnover of staff.

Stability index

The Stability Index data for the same populations during the same time period shows an increase from 88.1% to 92.1% in the control groups and an increase from 86.0% to 87.9% in the pilot groups. The pilot group change was +4.0 while the control group change was +1.9 indicating that both groups have a relatively stable workforce with experienced employees being retained.

Maternity returners

All HEI's in the study have a high return rate but the numbers involved are so small that no significant changes could be measured.

4.5.2 Health and Sickness Indicators

Lost time rate

There was a lack of data from half of the pilot groups and control groups but where information was available there was no significant difference between the absence rates in the pilot groups and the control groups overall and little change in either group over time.

Frequency rate

Data was only available from one institution.

4.6 Cost Analysis

An important part of the project research was to try and establish whether introducing flexible working arrangements resulted in any costs or savings for an organisation. The team were not in a position to analyse this directly at every pilot site and instead included a number of questions in the final manager questionnaire which focussed on costs and savings both in direct monetary terms and also in terms of management time. The questions and a summary of the responses from managers are detailed below:

How much time did you need to invest initially when implementing the pilot scheme?

The majority of managers spent less than 1 hour per week implementing the pilot scheme which implies that the scheme did not require a significant amount of management time. However, over a quarter of managers (27.3%) spent between 1 and 4 hours implementing the scheme and 2 managers (6.1%) spent between 4 and 8 hours implementing the scheme – see table 15 below.

Percentage of time spent implementing FEO	Percentage of managers
Less than 1 hour per week	42.4%
Between 1 and 4 hours per week	27.3%
Between 4 and 8 hours per week	6.1%
No response	24.2%

Table 15

How much time did you need to invest in managing the pilot scheme?

Once the scheme had been implemented over 70% of managers spent less than 1 hour per week on the scheme and only 3% spent more than 1 hour per week managing the scheme – see table 16 overleaf.

Percentage of time spent managing FEO	Percentage of managers
Less than 1 hour per week	72.7%
Between 1 and 4 hours per week	3.0%
Between 4 and 8 hours per week	0
No response	24.3%

Table 16

Have you identified any additional financial costs due to implementing the pilot scheme?

One manager identified a potential additional cost as a result of introducing more flexibility.

'This cost was the need for buying a clocking-in machine/software, the cost of which was not known.'

Most teams used a spreadsheet provided by the project team which had no cost attached. If the culture of the organisation is such that everyone is trusted to complete their own timesheet which is held on a shared drive and can be viewed by managers and colleagues alike then the scheme is self-monitoring and there is no cost involved. If an organisation requires a more formal system with employees clocking in and out of work then there will be a cost associated with introducing this type of system.

Have you identified any financial savings due to implementing the pilot scheme?

Two managers identified direct savings as a result of introducing more flexibility:

'Approx £10,000 per annum (agency staff savings)'

An employee changed from a regular pattern of 18.5 hours per week every week to working 30 hours some weeks of the year (at peak workload times), working 0 hours during the quietest periods and maintaining 18.5 hours per week during the rest of the year. The employee worked the same number of hours over the year but worked a seasonal pattern which meant that the institution did not have to recruit casual staff to help out at peak times and the employee was able to spend more time with family during the quieter summer period. The overall savings of not recruiting casual staff were estimated by the manager to be £10,000 per year.

'Some savings as one staff member worked part-time for a period of a few months.'

An academic member of staff applied for unpaid leave to pursue a hobby which meant the employee worked part-time over a period of about 3 months resulting in savings of approximately £2,000 - £3,000.

These direct cost savings are complemented by the indirect benefits identified in sections 4.3 and 4.4 such as improved morale, increased productivity and better team working.

4.7 Key issues

- There was a **great deal of evidence from the research that supports the business case** for flexible working - that it improves commitment, morale and productivity, and reduces stress with little or no reduction in office efficiency. Staff from the pilot groups made a variety of comments supporting this case, a selection of which were:

"I feel a flexible approach to working hours can generate more commitment from staff. I have worked on a flexible system before and it worked well."

"There is a lot of stress in my area and flexible working hours and working patterns would help to relieve this for all concerned."

"During discussion with colleagues we all agree that the scheme has been beneficial."

"Colleagues certainly approve of flexibility and flexible options of working. It is . . . very important to the working lives of many people."

"The members of our team have all opted for various flexible working options. We are all very happy about the way it can be adapted for our own individual needs and the scope it offers."

Respondents commented that staff feel empowered and in control of their own hours and elsewhere that staff have more choice but office productivity has not been compromised.

Productivity was improved and stress reduced. Even non participants have felt the benefit as colleagues are happier and less stressed. One manager commented:

"Other colleagues have found the scheme useful and feel that productivity has improved. There is a general feeling that stress levels on the whole have fallen."

Another line manager felt that staff were happier so "grumble" less about other things, and another commented that,

"Whilst I have not personally applied for any of the options, as a section leader I have found the introduction of the scheme to be very beneficial especially in terms of morale and team building."

Although more than half of respondents to the interim questionnaire believed that morale had not been affected by the scheme, a significant minority (over 35%) believed that it had either improved or greatly improved. Less than 4% believed that morale had been either reduced or greatly reduced.

Improved staff morale is one of the key factors supporting the business case for the introduction of flexible working, and managers were firmly of the opinion that this had improved. Almost 67% of responding managers reported that morale had either improved or greatly improved, whereas only 6.1% felt it had decreased. The respondents to the Interim survey also found that morale for individuals and teams had either improved or greatly improved (35% and 38.7% respectively).

Managers also responded positively on the matter of staff productivity. None of them felt that productivity had been reduced, although more than half felt it had been unaffected. However, more than 27% believed that productivity had either improved or greatly improved. Once again, managers were more positive than staff as a whole, although the Interim survey found that more than 1 in 5 (21%) believed productivity had either improved or greatly improved in individuals, and 17% believed this was the case with team performance.

- **Flexible working was operating well already in some departments**, working patchily and more informally in others, and not approved of elsewhere. This was backed up by the projects' audit of HEI's. The fear for some people was that formalising any informal arrangements would result in a loss of flexibility.

- There is a **perception that** only certain roles are suitable for certain forms of flexible working, but also that **access to flexibility is uneven** and this causes resentment between categories of staff. Support staff can resent the freedom academic staff seem to have, particularly with home-working, but equally academic staff comment that other staff have different terms and conditions, for instance settled holiday entitlements and more generous paternity leave. There seems to be a need to look at how terms and conditions of employment differ between categories of staff and between institutions, and how to deliver fair equitable flexibility to all employees. Some respondents pointed out that flexibility seemed to be on offer to certain staff groups, such as management and academic related staff, and not to others such as administrative staff.

There is much good practice, albeit much informal, from departments and managers who are adapting to need and workload, but this response is reactive rather than proactive, and some staff commented that they do not even ask as they know that the response would be negative.

One respondent in a line management role commented:

"We currently enjoy some degree of flexibility in our work informally/unofficially. We adopt the view that if we require staff to come in early, stay late and work some weekends, we must be prepared to allow them some degree of flexibility if they need to rearrange their hours in order to accommodate their domestic arrangements. I would welcome having this as official policy and therefore minimise possible perceived favouritism."

- There were comments on the perceived lack of care by the "institution", and the lack of support for work life balance at senior management level, although some individual departments were informally supportive and flexible. In fewer cases it was the department or line managers who were cited as inflexible. **The importance of the work culture of the whole organisation and senior management support** is backed up by the finding of the questionnaire filled in by pilot group line managers which revealed that for almost 58% of line managers, the attitude of senior managers was either significant or very significant to the success or failure of the scheme.

"There must be more recognition and acceptance of flexible working conditions from the top."

A number of respondents indicated their contentment with their job and immediate team, along with the flexibility offered within their department, but their dissatisfaction with the overall performance/care shown by the institution. This included a respondent given flexibility to study at postgraduate level by the department, but not feeling valued by the institution. Another respondent pointed to the apparent lack of training for managerial staff and those at Head of Department level.

A respondent in a managerial role commented that the communication and structure of an organisation needs to be looked at alongside flexible working, because a "top down" corporate structure can lead to employment experience becoming more inflexible, whereas flexible work needs conditions of "trust", "ownership", and "personal growth".

- **More advice is needed on the practical operation** of some forms of flexible working, such as calculating holidays and part time hours and advice on recording methods. Further understanding of how options such as compressed hours and seasonal hours operate and how they can be used within a team setting was also required.

There is a need to tackle the perception that staff working flexibly automatically take Mondays or Fridays as time off (particularly in the case of compressed hours or reduced hours) leaving less choice for other staff.

All options should be considered in context, so that workloads can be balanced across a team and/or department. This highlights the importance of management creating the right environment, where staff can talk about their needs, even where a flexible employment pilot is running –

“Greater encouragement by senior staff to join - no one in my office has joined and although I would like to, I feel this would not be allowed.”

- Even with legal requirements and policies in place **the attitude of local management is vital** to the success of a scheme. Managers need to be empowered to listen to staff and examine workloads more flexibility, through the whole work culture, training and use of guidelines. A package of flexible options available to all staff may reduce perceived favouritism among employees. The approach used when handling day to day issues can make an important difference to work life balance, stress, morale, job satisfaction and ultimately productivity.

There were several comments from staff on the need for training and guidelines for managers – to get commitment; fire enthusiasm; clarify the process of application and rejection; gain confidence to try things out and help with the flexible management needed to balance the needs of staff and the institution. Without the backing and encouragement of senior staff, employees feel they are “not allowed” to take up flexible options.

“More in terms of guidelines/training for line managers and supervisors prior to roll-out to ensure more enthusiastic commitment and a genuine opportunity for staff to explore flexibility in their work.”

One respondent made a telling point:

“Some of the statements in section 13 [of the initial questionnaire] seem quite radical for this organisation, but there is no real reason why they should. The important thing for this institution is to make sure staff have clear objectives and the necessary working conditions to achieve them. Whether people work from 9 till 5, Monday to Friday, is less important than what they achieve. However, I think there will be trouble getting middle management to accept this cultural shift. There is an emphasis on control rather than empowerment. I believe that my own line manager had commented that FEO will not work for this office.”

- Having to work long hours just to get the job done seems to be a huge issue for all categories of staff. Academic and management staff generally have flexibility to manage their hours to suit their work load and to occasionally work at home, but the **high workloads and pressure lead to long hours and a lack of balance**, which in turn can lead to stress, ill health and damage to family life. There are issues around the clarification of holiday entitlement for some academic staff, and also the balance between teaching, research and administration; the latter seemingly having grown rapidly over recent years. There is some recognition that long hours are needed at first to establish an academic career, but the main problem seems to be administrative tasks. However there is also comment that any monitoring of academic hours would reduce trust and breed resentment. It remains however that **long hours prevent the implementation or use of flexible working** and can lead to a lack of balance between work and home life.

Several people working long hours felt unable to operate flexible working and take the time owed, even using compressed hours or flexitime. Some cited stresses of the academic calendar, and one focus group participant said they felt guilty because they were working only contractual hours and some work was not getting done.

However, long hours were often mentioned by others too, both administrative staff and management/academic related staff. Several commented that until the hours are reduced there is no scope for flexibility –

“When overwhelmed with work, flexibility/flexi-time doesn’t really help.”

One mentioned regular hours of 8am – 6pm and weekends, and this prevented the use of flexible options, although in an ideal world flexible working would be “great”.

Another respondent commented that –

“Avoiding 11 hour days would be good to start with.”

However, another commented that flexible working could help with a heavy workload, and suggested using compressed hours and occasional home-working to help deal with workload, open plan office, constant interruptions and enquires. There was also a suggestion that moving staff between departments would help with workloads and clear backlogs.

- **Academic staff were not always aware that they already had access to flexible working practices** such as varying hours according to need, home-working, managing their own workloads, and being judged on outputs rather than time, and therefore viewed it as irrelevant. They tended to feel that long hours were a major issue for them.

This topic was frequently mentioned by respondents from the academic staff group, with one commenting that, in an ideal world, balanced work commitment, some freedom at the edges, proper breaks, and less long hours is the healthy option. In practice they feel *“stretched and stressed”*.

Academic staff almost invariably work long hours and weekends –

*“Research is done in what a normal 9-5 job would consider “our own time”.
9-5 we are teaching, admin and generally organising.”*

Some academic staff mention 60-70 hour weeks in term time, and on top of this researching/writing for publication in their own time, even though these aspects form part of an academic contract. Leave entitlement is not taken, and unpaid leave means finding cover for lectures and tutorials. One respondent noted;

“My home life is drastically affected by my workload over a long period now.”

- There needs to be more recognition that **peoples' needs change throughout their working lives**, and no job or life responsibilities stay the same. The concern is that flexible working is seen as pandering to those with children. However, those without dependents have commented on seeing the relevance and importance for those who have, and others have expressed relief that these things are available should they need them in the future. **Many without dependents commented on how much they valued flexibility to enhance their working and personal lives.**

Many respondents felt that their ability to enjoy leisure and/or social opportunities had been positively affected by the pilot scheme. Nearly 31% of respondents felt that this area of their life had either improved or greatly improved, whilst only 1.7% felt it had negatively affected them.

- Employers need to be aware that **work impacts on the wider community** and the ability of employees to commit to regular voluntary activities, as well as pursuing leisure and social opportunities.
- **Staff value enormously the ability to vary their own hours** through the use of such schemes as **flexitime**, however it **is often not seen as flexible enough** to meet peoples' needs. Staff could be trusted more to use their hours well and work in self managed teams, reducing the need for core hours. One of the pilot groups worked an extended scheme with no core hours which worked very well, with good team cooperation to cover the hours needed in the office. There are fears that a change in personnel in a department where flexibility is working may cause problems, whether it be a new manager or a new, less flexible, team member.

One respondent commented that flexitime had been available in their old job, and that they had applied for their current job because it offered flexitime and they believed that generally flexible options were important. Another commented:

“I have worked in flexi-hour environments in the past. I feel they benefit and motivate staff. Different people work better in the mornings or evenings and they should be given the opportunity to achieve their best.”

Another respondent commented that they were:

"Very happy with flexitime opportunities."

Conversely a respondent from an area where flexitime is unknown expressed uncertainty:

"The topics of hours and changing them to suit yourself seems good but rather idealistic"

They went on to suggest that monitoring needs to be of a high standard and would take time and money. As has been demonstrated in the pilot study, **it is a big step into the unknown for some managers and departments.**

There were many comments on the usefulness of flexitime to cope with caring responsibilities –

"Flexibility is vital for those with small children and other dependents, and should be available for all staff sections."

However there were also many others highlighting the use of flexitime to solve other issues. One respondent stated that they were in favour of "flexi hours", starting about half an hour earlier and finishing half an hour earlier. They comment that flexibility improves motivation and raises morale, and should also reduce sickness absence. It also enables travelling outside of the rush hour so that time and energy are saved and stress levels reduced.

This particular respondent would also like to work longer hours in winter and shorter in the summer. Others used flexitime in particular to cope with the journey to and from work, both by private car and by public transport. An early start to avoid traffic and get parking at the institution was mentioned by several respondents but this issue was identified at the later focus groups for participants as one of the barriers to using flexitime fully for those people arriving later than the normal start time. One respondent commented:

"I think the flexible scheme is working well. Due to car parking problems, I can see myself having to revert back to my old hours. This will definitely affect my morale and increase levels of stress. It will also mean a financial loss as I will have to start paying a childminder again."

One respondent chose not to make use of the flexitime system due to a car share arrangement and the need therefore to stick to particular hours, and another welcomed flexibility to cope with the weather and a journey to work crossing rivers liable to flooding.

Some respondents commented on the actual operation of the system, one stating that it is essential that flexitime is co-ordinated to maintain service level and prevent colleagues taking on a disproportionate amount of work. One commented –

“If flexitime was introduced, not sure whether I would qualify as I am part-time. If I had the choice, I would welcome flexible working hours.”

Another respondent commented –

“As a part timer working in the flex-time system, I already have some access to flexible working. I would welcome the opportunity to take up more flexible working, should the need arise in the future.”

There were some comments on core hours – that they were not flexible enough; that core hours of 2-4 do not sit well with school hours, or accommodate other more occasional appointments; that a relaxation of the core hours would make the system much more useful. There were more comments to this effect included in the Interim questionnaire filled in by pilot scheme participants. One of the projects' pilot groups successfully trialled a flexitime scheme with no core hours. Core hours were often viewed as too limiting especially the 4pm limit, as employees find it frustrating to be able to come in early but not go early. However, one respondent wanted the flexitime scheme extended to 7.30pm to cover work such as organising graduation ceremonies.

There were difficulties with finding an adequate monitoring/recording system which could cope with a large department and which did not reduce trust, but instead gave employees a sense of being in charge of their own workloads and times; difficulties in finding systems that could cope with the part time and weekend hours, be easy to use, be transparent, and easy for managers to monitor.

One respondent commented that as flexitime was already in place and the office open 8am-6.30pm, they felt the other options offered limited benefit.

Managers were requested to report on their perception of the success of particular options offered within the scheme and in line with other national surveys, the option perceived as most successful was flexitime. Nearly half of the managers regarded flexitime as very successful and a further 15.2% reported it was successful, with less than 10% neutral, and no responses indicating unsuccessful.

- Compressed hours worked well for some people, but were difficult to operate in other circumstances due to operational details or changes to job role. Many found flexitime suited their needs better. Compressed hours was the only option that was perceived by managers to be unsuccessful and only one felt that this was the case. However, **compressed hours offers good possibilities for those working in more senior roles, especially where other options do not appear feasible**, allowing long days, but also some time off. One manager commented:

"the compressed hours option fits well with my personal needs, my work and also my colleagues work and personal needs."

- The family friendly policies for those caring for children are seen as very important, and there were many comments centred around the problem of getting children to school and coping with school holidays. However single parents may have different issues. There is also evidence that there is local flexibility and help for those who are caring for ill or disabled dependents, but less flexibility on work patterns for those employees with permanent illness or disability, or for those with elderly dependents. However it is **important to be seen to be fair** and to ensure that those without dependents are not always left to cover unsocial hours or Friday afternoons.

The pilot scheme had a positive influence on respondents' ability to accommodate their caring responsibilities. More than a quarter (25.5%) felt that this had either improved or greatly improved, whereas only 2 respondents (0.9%) felt that the pilot scheme had reduced their ability to combine work with caring.

There was one request for institutions to provide more childcare facilities. This was also mentioned by an academic respondent who was wary of reducing hours, but had difficulty with after-school care. Respondents would also have liked greater flexibility around returning to work after maternity leave.

There were several comments concerning adjustment of hours to cope with caring for children. The comments below highlight that flexibility in a job is often the priority, rather than career opportunities, and suggest that organisations may not be providing promotion opportunities for talented members of staff because flexibility is not on offer for higher level roles –

“While more money/recognition etc. would be very nice, the most important thing to me is the opportunity to structure my hours around my child, who starts school in September.”

“Institution gives flexibility for childcare arrangements, but not the stimulus or any career path.”

Another person wanted flexible working so that they could alter their own work patterns to fit round a child starting school and a partner’s shift pattern. Another highlighted the “juggling” that many parents do to combine caring and work –

“As the mother of two small sons, I would welcome the opportunity to work more flexibly to fit in around school hours/ holidays, without reducing my overall working hours. At present juggling between work and childcare commitments is extremely stressful and can occasionally affect my performance at work.”

There were several comments on combining career and childcare, particularly from academic staff –

“The post I am in (Academic) has permitted flexible working hours so that I could drop off and collect children when needed and put the extra time in at home - this was very useful indeed.”

“I would like the opportunity to reduce my hours for 18 months or so when they (two children, currently primary) move to senior school. The university seems to encourage mothers back to work, but not be particularly flexible to any future changes where childcare demands become a problem.”

There were particular problems for single parents, including job security –

“I am glad that (the institution) is looking into this issue, as the balancing of work and home is always difficult when you are a parent! Especially a single parent.”

“Flexible working is cloud cuckoo land for lone parents with dependent children and child care costs. If I was part of a standard nuclear family with another member of the family working full time I could afford some of these options. As I am not, realistically they will never be open to me. So in some aspects they are window dressing rather than true provision of equal opportunities.”

A similar employee was more positive -

"On the whole I find the degree of flexibility in my job as it is quite satisfactory. I am able to do some tasks at home if this fits in with my timetable at the University. Although I do a lot of work during vacations, there is flexibility over when and where this is done. At present I do not require additional flexibility, although circumstance can change. I do not want to reduce my hours, or to work extra long hours in order to get days off at other times. The main issue for me is job security."

Children were not, of course, the sole source of caring responsibility –

"Questionnaire picked out varying hours to deal with childcare but not disability/health problems."

The respondent goes on to comment that some disorders / disabilities are better/worse at certain times of the day and flexible working can be used to make use of the best times. Also that flexibility can be used to cope with treatment and appointments.

"I would be interested in working some evenings/occasional weekends to increase my 0.8 contract at times. I have regular caring commitments on Mon and Thurs pm and one in two Sundays, however I would be free some evenings and weekends to be able to increase my hours to 0.9 and this would obviously help with raising my salary."

Only one respondent specifically mentioned an elderly relative who will need care in the future, but demographic predictions suggest that this will be an issue of increasing concern. There were also some comments about the effects on those employees who do not have children -

"Flexibility for some on childcare means those who do not have children end up doing all the unsocial hours."

- As the literature suggests **part time workers can feel less valued**, with no career, and can be resented as those who "go early". More work needs to be done to convince managers and others that it is possible to work part time at all levels and with a career progression, and that commitment and productivity is often higher. As domestic and personal issues are usually dealt with outside working hours there is less interruption at work. Part time work is greatly valued by those juggling family needs, and was also regarded as a successful way of working by managers, although the numbers selecting this option under this scheme were relatively small.

More than 21% of pilot scheme managers considered that this option had been very successful, and a further 6.1% considered it had been successful. However, 63.6% of respondents either failed to answer this question or reported that it was not applicable.

- A member of **staff wanting to reduce their hours** from full time can pose **particular problems**, but such a request can be used to assess the work load and roles of the whole team. Such a request may be only a small reduction, perhaps a drop to 0.8 FTE or just a reduction during school holidays.

Although academic staff fear damaging their careers by reducing their hours, many have successfully done so to care for children. Others use sympathetic timetabling and the flexibility inherent in the role. However, a reduced post may still carry a high workload of teaching and administration but for less pay. Reduced hours can increase the pressure on the rest of the team, but so can other stress factors and ill health. It remains however that many staff have found that reducing their hours, either temporarily or permanently, has been very helpful in balancing work and home responsibilities.

- **Some roles may be suitable for seasonal or annualised hours**, although not necessarily following the traditional term-time pattern. There can be savings on the use of temporary staff at busy times and staff are able to recover time owed during quieter periods. Workflow very much varies from department to department and may be affected by the increasing all-year pattern of conferences, modules, short courses and courses starting at times other than the autumn. This option has been used successfully during the pilot scheme, with a staffing cost saving as a side benefit. Several respondents commented on how it could be used effectively:

"Flexible working would make a big difference to those of us who because of the nature of the job have very hectic periods of the year and who need a break to recoup, rather than eating into precious holiday time."

"Good idea to work more hours at certain times and work less at other times of the year."

"Have staff working different hours during vacation - with agreement from other staff."

- Home-working has traditionally been confined to academic and management staff but in fact **many other roles may successfully incorporate some home-working**. Staff usually request home-working firstly to ease travel, secondly to enable them to complete work in a quieter environment, and in a few cases to combine this with fixed nursery/ school timings or childcare.

All comments referred to occasional home-working, no more than a day a week. Although this option can be used to combine work with care of dependents, this would not be feasible with babies, young children or anyone needing constant attention and care. More credence could be given to staff being aware of their own work loads and knowing what will help them personally to achieve their goals and what will not. Thought would need to be given to other issues such as IT support, as one respondent noted -

“If we are to work from home effectively, staff need to be provided with appropriate IT equipment and support.”

- The **option to reduce hours approaching retirement** rather than having an abrupt end has some popularity, and understandably more comments were received from those approaching the end of their careers. However the **biggest issue was the effect on pensions**. These issues are likely to be addressed at a national level as the population ages and people live for longer.

Any interest in reducing hours leading up to retirement also cited preservation of pension rights, particularly concerns about final salary. One respondent talked of resigning at 60 and then looking for new part time work.

Flexible working could form part of a whole retirement planning package –

“Most of this doesn’t affect me - I have fairly flexible hours. Planning for retirement would be something that I would like to see offered to staff around my age”.

- There was much **positive support for the project itself**, and people were encouraged by the fact the issue of flexible working was being investigated. Many commented on how they had benefited from taking part in the FEO project. Comments from participants included:

"Members of my team have been happy with the scheme. Putting in extra hours is no problem, but taking time off is often difficult because of pressure of work - but we manage."

"The feedback has been very positive; it has given first line managers more control over their sections activities."

"I've only had positive feedback from staff. They have always been an excellent team, but they have responded very positively to the appreciation of their circumstances and the trust that has been placed on them to manage workloads and still provide a good quality service."

The responses contained many supportive comments about how beneficial the scheme is, how pleased staff are that it is available and how they hope it will continue, including –

"Please continue this scheme. Some people may only be able to work if such schemes are in existence."

5.0 CONCLUSIONS

While there is evidence of widespread flexibility across the sector it appears to be largely informal, inconsistent and not monitored or evaluated effectively. This means that many employees do not have access to any form of flexible working while many of those who do, have to rely on the goodwill of their manager as there is no formal policy in place. This would suggest that there is scope for the HE sector to capitalise on the potential benefits that introducing more formal, consistent and well-managed schemes can bring.

Historically the HE sector has allowed some flexibility in terms of working arrangements particularly for academic staff. Some of the pilot departments, being academic based, already had a large majority of the staff working flexibly, albeit informally. In these departments concerns about working conditions, workloads and working long hours were raised, with many academics believing that heavy workloads prevent them from taking advantage of any flexible arrangements. However the support staff in these departments seemed to benefit greatly from having access to the scheme. HEI's will have to address these wider issues related to academic staff if the benefits of offering flexible working arrangements are to be optimised for both organisations and employees. The issues concerning the applicability of flexible working options to academic staff will be taken up as a separate issue in the second stage of the FEO project.

It is clear that senior management "buy-in", commitment and enthusiasm are needed for success, but it must be recognised that this group of staff may have their own work/life balance issues. Comments such as *"They [the staff] appear to like it."* and *"This seems to be a paper generation exercise."* highlight the importance of senior management attitudes to work organisation and understanding the concepts of flexible working. Having commitment from senior managers before this type of scheme is introduced is essential but equally important is the support of middle managers who will directly manage the scheme. With the support of their line manager, employees will have a clearer understanding of the policy and the available options and will be more inclined to have a positive approach towards trying an option and making it work on a personal level and also at a team and organisation level. If line managers indicate to staff that they do not support the scheme then the take up of options is likely to be very low. The most successful pilot schemes have been in groups where the line manager was confident, enthusiastic and determined that the pilot would succeed. The need for more training and guidance for line managers, so they can provide a genuine opportunity to explore flexible work patterns, will be taken further as part of the second stage of the FEO project.

Most groups were satisfied with the information that they received about the project and felt that they had the support they needed although new employees were not always informed about the scheme and it was sometimes not made clear to existing staff that they could apply for an option at any stage, not just at the beginning of the pilot. Comments from participants also imply that some departments did not meet regularly to review the scheme and flexible working was not openly discussed. Only one respondent mentioned that regular review meetings had been taking place. Regular, clear communication is vital throughout the process, so that staff feel supported and confident in using the scheme. In some cases there may have been a lack of support from senior management after the initial launch of the pilot, and no encouragement to join or to find common solutions for team working. One respondent had commented that they would have liked to have tried an option, but as no one else in the department had requested more flexibility, they did not like to ask and there was no encouragement or open discussion. Some managers took a team-based approach and decisions about flexible working were discussed collectively; this approach appeared to work well particularly when employees were given the responsibility, as a team, for ensuring that service standards were maintained.

The majority of employees in the pilot scheme indicated that they would value more flexibility and that their current role did not provide them with as much flexibility as they would like in their ideal job. Although the results showed that more women than men wanted access to more flexible work arrangements it was not just those employees with caring responsibilities who were interested in flexible working but the vast majority of employees. In groups where more flexibility was offered to employees, work life balance for these individuals improved over the period of the pilot schemes whereas for the employees in the control groups this was not the case; this would suggest that providing access to more flexibility has the effect of improving work life balance for individuals. This evidence would imply that HEI's could do more to improve the job satisfaction of the majority of employees by providing more flexible working arrangements.

Interest in the option to vary hours on a daily basis, i.e. some kind of flexitime scheme, was greater than for any other option although there was significant interest in all the options. The vast majority of those employees that did request an option wanted to work some kind of flexitime scheme where their hours, days and location of work remained largely the same but there was an opportunity to adjust the pattern to some degree. Introducing a flexitime scheme is one of the simplest ways of allowing employees some flexibility, while the organisation incurs negligible costs and potentially benefits from factors such as increased morale and productivity.

The vast majority of staff are content to continue working standard hours and patterns. Despite the fears of some managers prior to the scheme that offering more flexibility would 'open the floodgates' and make managing a team impossible, only about 20% of employees requested a change through the scheme. For the majority of participants who actually took a flexible option the scheme worked very well and the perception of these people was that the personal benefits and the benefits for their team were significant. This perception was also reflected in the responses of the people within the pilot groups who chose not to apply for any flexible options. The managers taking part also felt that the scheme was a success and recognised the benefits for the team and for the organisation. Many of the benefits suggested in the literature on flexible working were in evidence in the pilot scheme, for example, increased morale, productivity and team working.

Speedier decision making; monitoring systems that work well; holiday calculations; changing the way a team operated; managing days off and workloads all were issues that line managers had to tackle, often in a new way and for the first time. The project team were available to provide practical advice in some of these situations. The better known options inevitably caused fewer problems than others, but delays while details were sorted out frustrated participants who wanted to start using flexible options. Departments who went ahead and approved options seemed to fare better, even though after a review some participants changed what they were doing and used another option instead. The compressed hours and selling/buying annual leave options seemed to cause the most problems, although conversely in several cases the compressed hours option worked very well.

The concern that increased flexibility for some employees might cause friction within a team appears to be largely unfounded. Where discontent was in evidence this appeared to be either the highlighting of existing tensions or the result of poor management such as a lack of feedback for applicants or poorly thought-through implementation. Introducing a scheme of this type does not need to result in disruption within the team; some managers recognised the benefits of reviewing the way the team approached its work and empowering teams to manage flexibility themselves.

There are limitations to introducing flexible arrangements which need to be given careful consideration. For example, some employees will be very limited in the flexibility they can use due to the nature of their role and where teams are small i.e. 2 or 3 people there is less scope for flexibility to be introduced although most roles and team situations do allow some flexibility.

There are no significant costs associated with the introduction of this type of scheme other than administration and management time during the design and implementation stages. The project pilot groups provided some examples of direct cost savings for the organisation which gives an indication of the potential financial benefits of introducing this type of scheme.

Guidance on monitoring systems, calculating hours and holidays may be necessary for some options as well as guidance on the suitability of options for certain job roles/workloads. More training could help managers and staff to plan options more effectively in relation to the team and workloads, not just personal choice. A better understanding of seasonal or annualised hours may help those employees who have heavy workloads but do not seem to be able to use compressed hours or flexitime successfully.

Overall the feeling of people within the pilot scheme seems to be that when flexible working is implemented properly, it is very beneficial and works well, but where it is implemented and supported poorly it can have exaggerated negative effects. The effects of a rejection or little feedback when someone has applied for a flexible option seem to ripple out to the rest of the department/team. In addition, trying to implement flexible working may heighten already existing tensions between line managers and their team or between individuals and/or teams.

Finally, the variety of the responses even from within the same department illustrates the fact the flexible working is highly individual, and what is beneficial to one individual or team may not be right for another. Whether the desire to implement flexible working comes from the top down or increasingly from individual staff requests, options need to be considered in the context of the whole team and overall workload, and reviewed regularly.

6.0 RECOMMENDATIONS

Based on the project research and evaluation of the pilot schemes the FEO team recommends that:

- *The sector takes action to address the issues highlighted by academic staff regarding their concerns over heavy workloads and their inability to utilise flexible working arrangements.*
- *The sector improves the method of collection and analysis of data regarding absence levels and turnover of staff so that more effective monitoring of schemes of this type can take place.*
- *All HEI's that currently do not have a formal policy for flexible working consider introducing this type of scheme within their organisation and, as a minimum introduce a flexi-time scheme for support staff.*
- *Appropriate training for managers is designed and offered to all HEI's to assist organisations in implementing this type of scheme effectively.*

More specifically, in terms of introducing a flexible working policy it is recommended that HEI's:

- *Ensure that flexible policies apply to **all** employees and not just particular groups such as academic staff or women with children. This will promote a fairer working environment for everyone and a consistent approach will also ensure that claims of discrimination are avoided.*
- *Consider all requests for flexible working on an individual basis and focus on the business case rather than on the personal reasons for the request. The needs of the organisation should be treated as a priority but not used as an excuse to refuse every application.*
- *Keep flexible working as a privilege not an entitlement and do not write flexibility into contracts otherwise it will not be flexible.*

- *Ensure that any part-time workers are treated in the same way as full-time workers in terms of allowing career breaks, maternity leave etc and ensure that all employees on fixed-term contracts are treated no less favourable than employees on permanent contracts including any provision for flexible work arrangements.*

In terms of the specific flexible options included in the FEO pilot scheme it is recommended that:

- *All the options should be given consideration by HEI's to be included in any flexible working policy although some options e.g. personalised annual leave may only be appropriate for a small number of HEI's.*
- *HEI's also consider the inclusion of longer-term flexible options such as career breaks which were not included in the FEO pilot scheme due to time restrictions.*
- **Flexitime scheme**
 - *consider which staff groups can or should be included in this scheme*
 - *make use of an open and accessible computerised time recording system for ease of use and no cost e.g. excel spreadsheet*
 - *define the parameters of the scheme at the outset e.g. what are the core hours (if any), how much time can be accrued and over what period, how much time can be taken as leave and over what period*
- **Unpaid leave**
 - *ensure that all leave is unpaid to avoid discrimination claims*
 - *define the limits of the scheme e.g. minimum and maximum number of days to be taken*
 - *agree a definition of what will constitute a day's pay*
- **Home-working**
 - *ensure that employees are not working over 48 hours per week in line with the Working Time Directive (unless they have chosen to opt out) and that they are having breaks from work at the appropriate times*
 - *ensure that any home-workers are covered by the health and safety regulations and have adequate insurance provision*
 - *clarify from the outset which party will have responsibility for buying, installing and maintaining equipment used at home*

- **Compressed hours**
 - *establish how sickness benefits and holidays will be paid to employees who do not work a standard length day*
 - *if possible use in conjunction with a computerised flexitime system for ease of use*

- **Staggered hours**
 - *use as a separate option or include as part of a flexitime scheme*

- **Seasonal hours**
 - *establish a pattern that meets the needs of the team/organisation as well as those of the employee*
 - *agree an annual pattern in advance*

- **Part-time working**
 - *for reduced hours prior to retirement consult the pensions advisor and ensure that the employee is aware of any implications*
 - *for reduced hours on a temporary basis be clear about the end date for the arrangement*

- **Personalised annual leave**
 - *give careful consideration to both the financial implications for the organisation and the health implications for the employee of allowing staff to sell annual leave*
 - *ensure that the policy concerning this option is clear about dealing with employees who have a poor sickness absence record who apply to sell annual leave*

As a practical guide to the implementation of this type of scheme the following section suggests the next steps that an organisation considering this approach should adopt.

7.0 NEXT STEPS

- 1. Use a business case approach to identify the benefits for the organisation of implementing a flexible working policy.**
 - Define clearly all the direct and indirect benefits for employees, customers and the organisation
 - Identify any potential costs such as the design, administration and training associated with the scheme
 - Be realistic about the limitations of any scheme

- 2. Use this business case to convince senior managers within the organisation to adopt this approach**
 - Identify champions to promote the scheme
 - Develop a training programme on both cultural and practical issues for managers.

- 3. Review current flexible working practices within the organisation**
 - Identify formal and informal practices within the organisation
 - Understand which groups of staff are eligible to use these practices
 - Identify any areas of good practice or resistance to flexibility
 - Review the training provided for managers and, if appropriate, include training on flexible working

- 4. Carry out an audit to establish what flexibility employees require and to establish what flexibility would help the organisation to meet customer needs**
 - Involve as many employees as possible including managers at all levels
 - Communicate effectively so that people understand the reasons for asking and take care not to raise expectations too high

5. Design a programme of options to suit both the organisation and employee needs

- Involve employee representatives when designing and implementing the scheme
- Have a clear policy on how the scheme will work and who it will apply to
- Emphasise that flexibility is a privilege and not a right
- Simplify the application form and process as far as possible and include guidelines on how much employees need to write in support of their request for flexible working
- Where possible include examples, either from other organisations or an anonymised copy of an application form already completed
- Provide guidelines for managers to help them assess applications for flexible working and to make informed decisions
- Keep the scheme flexible so that managers and employees can use it effectively to meet the specific needs within their team
- Provide information on the details of how each option will operate in practice
- Ensure that information is available to staff on the implications of any option chosen (this is particularly important in the case of reduced hours, which will impact upon both current income and future pension entitlement)

6. Define performance indicators to measure the success of the scheme e.g. staff turnover and absence levels

- Ensure that these measures are simple and easily measured
- Set up processes to ensure they are measured regularly

7. Pilot the scheme with key groups before extending across the organisation

- Choose groups that are positive towards the idea and will support the scheme in principle
- Identify managers who are prepared to make the scheme work successfully
- Choose a big enough sample to give meaningful results but not so large that it becomes unwieldy to evaluate

8. Evaluate the success/failure of the pilot scheme

- Collect data via questionnaires, focus groups, interviews and performance measures as appropriate
- Analyse the data to highlight key issues and evaluate the effectiveness of the scheme
- Involve all groups in the evaluation of the scheme including participants, non-participants and managers
- Maintain the confidentiality of individuals to ensure the integrity of the scheme
- Use the feedback obtained from the employees and managers to make any alterations to required to the policy
- Involve managers and employee representatives when finalising the overall scheme for the organisation

9. Communicate the new, organisation-wide scheme as widely as possible

- Make sure managers are clear and confident about the scheme
- Provide appropriate training for managers and ensure appropriate support is available throughout the duration of the scheme
- Publicise the scheme as widely as possible and ensure that all staff are aware of how it will operate in practice
- Give people an opportunity to ask questions or raise issues

10. Monitor and review

- Establish regular, clear communication channels (possibly in the form of team or departmental meetings) to ensure that staff feel supported and any issues or problems that have arisen can be aired and tackled at an early stage
- Review team/department performance of the scheme every 3 – 6 months at the outset of the scheme
- Identify any issues at an early stage and address them
- Review the performance of the overall scheme on an annual basis
- Use the scheme as a selling point when advertising/recruiting for new staff

APPENDIX 1 – LEGISLATION SUMMARY

There are many areas of legislation that now impact on working arrangements but the Employment Act 2002 is the first to directly address issues of flexibility. With a trend towards more flexibility in the workplace employers need to be increasingly aware of the effect that any new legislation or case-law could have on flexible working arrangements. The areas where employers are most vulnerable are;

- in dealing with requests for part-time working, where they may be open to sex discrimination claims
- in dealing with requests for flexible working arrangements under the Employment Act 2002
- patterns of work that could mean employees working too many hours in contravention of the Working Time Directive
- requests for home-working with Health and Safety implications
- fixed-term contracts

In terms of the most common flexible employment options a more in-depth analysis of the legislative impact is discussed below.

Arrangement of hours

(flexitime schemes, compressed hours, annualised/seasonal hours, shift working)

Number of hours worked

One of the main points in this area is that it is essential to ensure that staff are not working more hours in total than is allowed by the Working Time Regulations. It is also critical that adequate rest breaks are built-in to the working day. One of the dangers of allowing this type of flexibility is that staff can actually work longer hours than is permitted or fail to take breaks as often as they should. If a long-hours culture means that employees are rewarded for 'presenteeism' rather than actual contribution to the organisation then there is a risk that unless flexibility is properly managed the employee could actually work very long hours although less effectively.

Discrimination

Discrimination could also be an issue in this area of flexibility, for example, if an employee wants to work the same total number of hours but with a slightly different working pattern to cope with childcare arrangements. A number of women have successfully claimed sex discrimination in this area (e.g. *Wright v Rugby Borough Council*).

Location of work (*at home or from another part of the organisation*)

Health and safety

If individuals are working from home the employer has a responsibility to ensure that the home environment is suitable and safe for the purpose of work. The general duty of care by the employer originated in the 1974 Health and Safety at Work Act which has since been supplemented by numerous regulations. The two most relevant regulations are:

- The Management of Health and Safety at Work Regulations 1999
- Health and Safety (Display Screen Equipment) Regulations 1992

These regulations involve carrying out a risk assessment at the individual's home-working environment to ensure that the work-station is ergonomically correct and that all equipment is safe for use. Hazards must be identified, potential risks assessed and any findings recorded and checked periodically.

Insurance

In terms of insurance an employee is normally covered by the organisation's insurance while they are on the premises but additional insurance would need to be in place for every individual working from home whether they were working from home regularly or infrequently.

Sex Discrimination

Sex discrimination could also be an issue and all requests from employees to work from home must be given very careful consideration. Case law shows that if someone wants to work from home for childcare related reasons then the employer who refuses such a request may be open to a claim of sex discrimination (e.g. *Lockwood v Crawley Warren Group Ltd*).

Disability Discrimination

Requests by disabled employees must also be given serious consideration. An employment tribunal has already ruled in favour of home-working on a temporary basis for a disabled employee, (*London Borough of Hillingdon v Morgan*). The decision was upheld by the EAT which ruled that such a large organisation should have been able to accommodate a phased return to work and should have considered whether the duties of the job could have been performed at home.

Other issues that need to be considered are, for example, monitoring the number of hours actually worked and also the number of and length of breaks that an employee has while they are working at home. The HE sector is particularly vulnerable in this area as it is accepted practice for many academic staff to work from home on a regular basis.

Leave arrangements

Unpaid leave

Legislation (Employment Relations Act 1999) now provides that employees are entitled to reasonable time off to look after dependants or for domestic crises. Employees are entitled to this right regardless of length of service and employers may face claims of unfair dismissal if employees are not allowed this right (e.g. *Percy v Metcalf*).

The main issue here is to ensure that there is a clear policy on whether or not the leave should be paid or unpaid. If an employer allows an employee a few hours unpaid leave in one particular week they have to notify payroll and a calculation needs to be done to correct their salary for that month. This creates an administrative burden on the organisation. However if the employer chooses to ignore the few hours lost and pays the employee their full salary then they are setting a precedent and must take care to state that payment is at the discretion of the employer.

Number of hours worked

(part-time, job-share, term-time working, pre-retirement reduction in hours)

Number of hours worked

In most cases this involves a reduction in hours for the employee but an individual could be doing more than one job and so again care must be taken to monitor the total number of hours worked.

Sex discrimination

In all cases the employer will have to take care in ensuring that any flexibility is applied consistently so that the organisation is not vulnerable to claims of discrimination. Case law has demonstrated that under the SDA an employer must seriously consider a woman's request to work flexibly so that she can look after her children. If the employer refuses her request without good reason, she can claim indirect sex discrimination at an employment tribunal. The argument is that the requirement to work full-time is a condition with which fewer women than men can comply and that this is to the woman's detriment because her childcare responsibilities prevent her from complying with it. So unless the employer can justify the full-time requirement objectively then the woman is deemed to have suffered indirect sex discrimination. This applies to all women with children – including those going back to work after having a baby.

There are two methods that an employer can use to defend a claim of sex discrimination. The first is where they have sufficient objective business reasons for insisting that the job continues to be done full-time (e.g. *Bennett-Shaw v The Guide Association*). This argument is becoming increasingly difficult to prove.

In *Hampton v Dept. of Education and Science* (1989) the court ruled that the test for justification in refusing a request to work part-time involves striking a balance between the discriminatory effects of a requirement or condition and the reasonable need of the person who applies it. This principle applies to job-share arrangements as well as part-time working (e.g. *Marshall v Devon County Council*).

This type of case could in turn lead to discrimination claims from men who feel they are being treated less favourably than women if they are not entitled to reduce their hours in order to care for their children (e.g. *Gilbert v Thames Valley Police*).

The second method is to prove that the woman concerned can comply in practice with the requirement to work full-time (e.g. *Willett v Eden District Council*).

Part-time workers must not be treated any less favourably than full-time workers e.g. in terms of being allowed to take career breaks, maternity leave and parental leave. If the number of part-time workers increases in the future then this may become even more of an issue. Employers must be aware that by allowing flexibility, in terms of full-time employees changing to part-time hours, they must not treat employees any less favourably than when they were on full-time hours. If an employee feels that they are being treated any less favourably than a full-time employee (and they can use their own previous terms and conditions as the comparison) then they are entitled (under the Part-time Workers [Prevention of less Favourable Treatment] Regulations 2000) to ask for a written statement from the employer justifying the treatment and ultimately letting an Employment Tribunal decide if detrimental treatment is occurring and whether it is justified.

Flexible Working Hours (flexitime)

Flexitime involves employees working an agreed number of hours over a set period (typically a four, six or eight week period). There are usually “core” hours of attendance (typically 09.30 or 10.00 to 12.00 and 14.00 to 16.00) with a flexible arrangement for starting and finishing times and lunch breaks within agreed minimum and maximum limits. Staff are permitted to accrue a certain number of hours and to take time off in lieu.

Compressed Hours

With this option employees can extend the number of hours they work per day thereby working their weekly contractual hours over 4 or 4.5 days instead of 5 or their fortnightly contractual hours over 9 days instead of 10.

Seasonal Hours

This is a variation of annualised hours where staff work more hours at particular times of the year to take account of seasonal peaks and troughs in their workload. The hours to be worked by each employee are negotiated in advance, and can vary on a daily, weekly or monthly basis.

Part-Time Working

This usually refers to employees who work less than the standard full-time hours and are paid pro rata and received contractual benefits over a 52 week period. Various other types of part-time working exist, and include those defined below (such as job sharing, term time only working, etc).

Job Sharing

Job sharing involves two people sharing the duties and responsibilities of one full-time post, on the appropriate pay scale and terms of employment designed for that particular job. The division of hours is usually 50/50, two and a half days a week each, although some job share arrangements involve other options (e.g. alternate weeks, mornings/afternoons, two days/three days alternate weeks, etc).

Term-Time Only Working

This is a part time variation of annualised hours, in that staff work only during term time, leaving holidays free for parents with school age children to spend time with their family. Actual working hours during term time may be full or part time, and salaries may be paid either pro rata during the year or holidays may be treated as unpaid leave.

Temporary/Voluntary Reduced Hours

The duration of the reduced hours working period is usually agreed in advance, but may be flexible depending on the willingness of the employer and the needs of the employee. This option is particularly likely to be requested by women returning from maternity leave, or other employees experiencing personal or domestic situations which require a reduction in their normal full-time working pattern.

Pre Retirement Reduced Hours

This arrangement may be of particular benefit to some staff nearing retirement age, who have worked full time throughout their working life. It can enable them to reduce their hours gradually rather than moving from full time to zero time suddenly, and enables a smoother transition into the next phase.

Home-working

Flexibility in work locations is probably the most ad-hoc and variable option, but two main types of scheme appear to be in operation. Firstly, management or professional staff with employee status, who are fully integrated within the organisation's culture and who work flexibly in accordance with their own assessment of the demands of their workload and appropriate form of work location. Secondly, staff engaged in more routine and/or independent types of work (e.g. data entry, typing, editorial or research work). These workers were more likely to be self-employed, to be paid by results, to spend the majority of their working life at home, and be less well integrated within the organisation.

Unpaid leave

This option gives employees the opportunity to take time away from work for an agreed period of time which is unpaid.

Staggered hours

The employee works fixed hours every day but the start and finish times are can be agreed to suit the personal needs of the employee.

Personalised annual leave

Employees can apply to buy or sell annual leave. Buying annual leave is basically the same as applying for unpaid leave. Selling annual leave means that employees who have extra holidays that they don't want to take can sell these back to the employer.

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