



**Issue 1**  
**February 2007**

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**APPENDIX A: WORK-LIFE BALANCE REQUEST FORM**

## **1 INTRODUCTION**

### **1.1 Why have work-life balance policies?**

The main aim of work-life balance policies is to ensure that Council can deliver improved services whilst enabling employees to balance the needs of their personal and working lives. Antrim Borough Council recognises the need to provide policies which will enhance employee motivation and morale and the efficiency of the service.

Employee friendly working practices also feature strongly on the Government's agenda. The standard Monday to Friday, nine to five working pattern has become less relevant in terms of service provision and the Council has therefore developed this booklet to help ensure customer requirements continue to be met.

### **1.2 Who are work-life balance policies designed for?**

As employee's personal circumstances change during their life the balance which they require between work and personal responsibilities also changes. This can include caring responsibilities for dependents, career development, returning to study, approaching retirement etc. Council is committed to working towards the development of flexible work-life balance policies in accordance with employee needs and service requirements.

### **1.3 What is the 'Employer of Choice' programme?**

Antrim Borough Council made a commitment to becoming an Employer of Choice in 2005. The aim of the programme is to ensure that mutual benefit is gained from offering work-life balance solutions which will suit both the employee and the organisation. Council believes that work-life balance is directly linked to business performance and that personal balance issues must be addressed if employees are to fully contribute to their work and deliver high quality performance over time.

Through participation in the Employer of Choice programme, Council have made a clear commitment to incorporating work-life balance into the Strategic Planning process. A strategy and associated action plan have therefore been developed to enable us to achieve our aims. An Employer of Choice Working Group was created and this group meets on a regular basis to ensure that the action plan is progressing as well as ensuring continuous improvement over time.

### **1.3 Effective Date of Implementation**

The provisions within this booklet are correct at the date of issue of this document. Some of the provisions detailed may however be subject to amendment following any changes in legislation or following National Joint Council agreements. Employees will be advised of any such amendments as and when they occur.

### **1.4 Monitoring and Review**

The Council's Work-Life Balance Policy is being piloted for a one year period in order to ensure the needs of the Council and employees are being met. The aim is to move towards greater flexibility and provide work life balance for all employees in the future and this ethos will drive future policy reviews. A review will be carried out after one year to determine measures of success.

## 2 COUNCIL'S APPROACH

One of Council's aims in becoming an Employer of Choice is to:

**'Become an organisation that dares to be different'.**

This booklet represents one of the ways in which we seek to achieve this. Council believes that the most effective way to demonstrate a commitment to work-life balance is to provide employees with the freedom to request a work-life balance option which will meet their needs. Hence this booklet does not seek to describe a detailed range of policies for employees to choose from, rather the booklet provides a facility for employees to make proposals to suit.

## 3 ELIGIBILITY

All employees are eligible to make a request under our work-life balance policy. It is however crucial for employees to demonstrate how their request fits with the aim of achieving work-life balance.

## 4 WORK-LIFE BALANCE OPTIONS

Council's aim is to provide flexible, as opposed to prescriptive, options. Employees may wish to select an option which is currently available through our existing policies or they may propose alternatives which may better suit the circumstances.

**It is however important to stress that individual tailored solutions will be considered to ensure win-win solutions are found.**

## 5 MAKING A REQUEST

All requests for work-life balance must be made on the appropriate **'Work-Life Balance Request Form'** (Appendix A).

It is vital that **Section A** of this form is completed in as much detail as possible in order to facilitate a decision. As work-life balance solutions are aimed at providing win-win solutions, employees are asked to detail the impact which approval of their request could have upon the service. Employees are further asked to detail ways in which any negative impact might be dealt with. These sections are crucial to ensuring that requests can be considered.

Completed forms must be submitted to the immediate line manager and the approval process is explained in the section which follows.

## 6 APPROVALS PROCESS

The approvals process consists of two stages:

### **Stage 1: Line Management Assessment**

On receipt of a completed Work-Life Balance Request Form, the line manager must forward a copy to human resources at the earliest opportunity so that the request can be formally acknowledged. The line manager must then complete **Section B** of the form which details the organisational considerations relating to the request and requires the line manager to make a recommendation regarding the request.

In the event of uncertainty, advice and guidance should be obtained from either a senior manager and/or a member of Human Resources.

The timescale for completion of the assessment is **20 working days** from receipt of the request.

Having completed Section B of the form it should be immediately **referred to the appropriate Assistant Director** who will liaise with the Director prior to forwarding to Human Resources to make arrangements for Stage 2 of the process.

**NOTE: ALL APPLICATIONS, WHETHER BEING RECOMMENDED FOR APPROVAL AT STAGE 1 OR NOT, MUST PROCEED TO STAGE 2.**

### **Stage 2: Employer of Choice – Panel Approval**

In order to ensure consistency and equity across Council, all Work-Life Balance Requests will be considered by a panel. The panel will aim to meet to consider the request no later than **10 working days** of receipt of the request form from the line manager.

The panel will comprise a sub-section of the Employer of Choice Working Group and as far as possible will include:

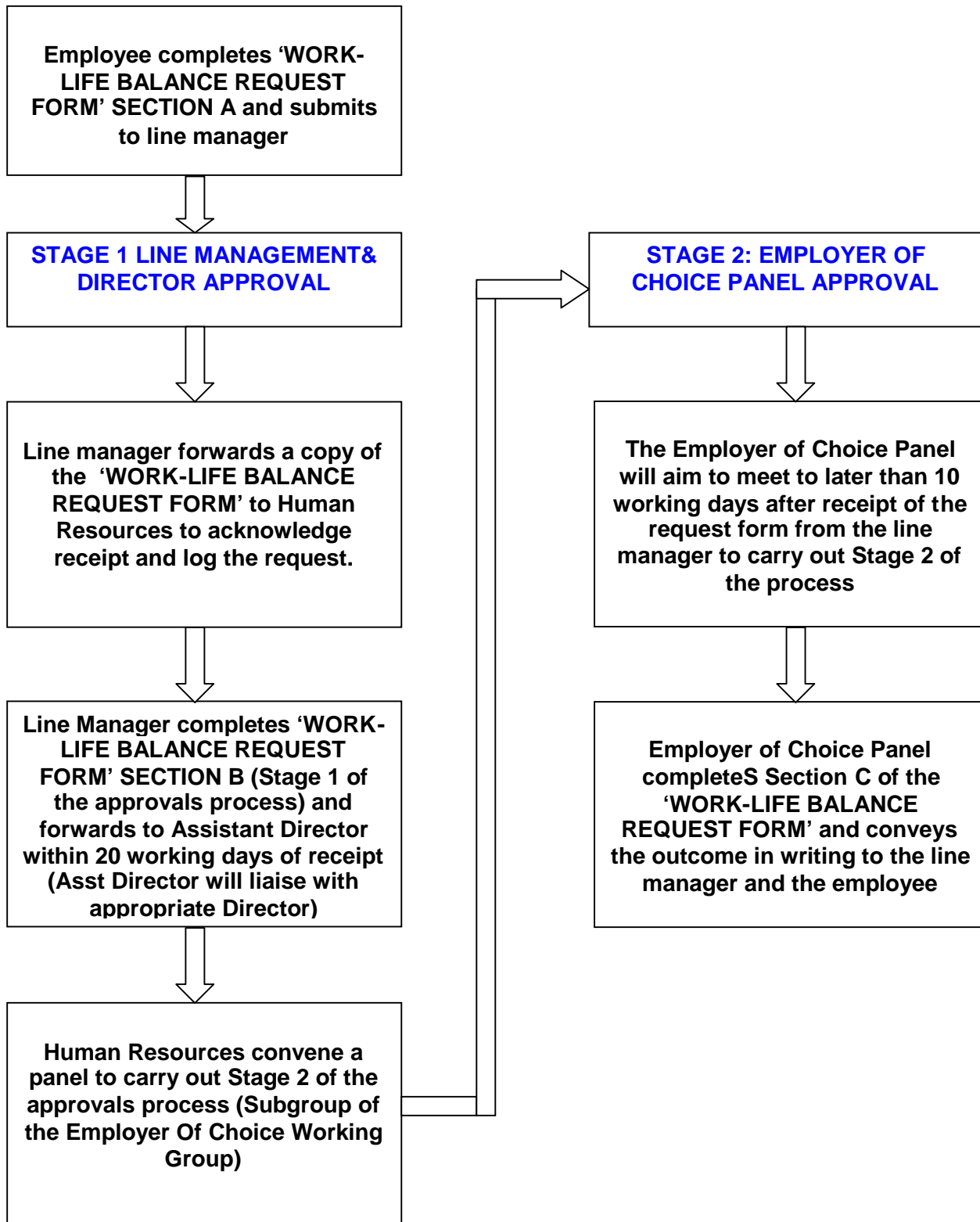
- A Senior Manager (Asst Director or Above)
- A Senior HR representative (Asst Director or nominee)
- A Trade Union or Employee Representative

The panel will consider the case set out by both the employer and the line manager and before reaching a conclusion. The panel may decide to:

1. Approve the application in full
2. Approve the application in part (following consultation with the head of the service)
3. Reject the application.

**NOTE: The decision of the panel is final and binding on all parties. Employees whose requests are rejected may seek feedback which would assist in any future requests.**

## WORK-LIFE BALANCE REQUEST FLOW CHART





# APPENDIX A



## **WORK-LIFE BALANCE REQUEST FORM**

### **Note to the Employee:**

This form can be used to make an application to work flexibly to achieve work-life balance. In order to assist Antrim Borough Council in considering your request you should provide as much information as you can about your request. It is important that you complete all sections of the form otherwise your request may not be valid. Once you have completed the form you should forward it immediately to your line manager. If the request is granted, this will represent a permanent change to your terms and conditions unless otherwise agreed.

### **Note to the Line Manager:**

This is a formal application made under Council's Work-Life Balance Policy. All such applications will be considered seriously. It is recommended that you arrange a meeting with the employee within 10 working days of receipt of this form to discuss the request

## **SECTION A: MAKING A REQUEST**

**NAME:** \_\_\_\_\_ **SECTION:** \_\_\_\_\_

### **1. Reason for Request**

I would like to make an application to work flexibly to achieve work-life balance. I confirm that the reason for this request is to improve my work-life balance in the following way:

### **2. Nature of the Change Requested**

2.1 Describe your current working pattern (days/hours/times worked)

2.2 Describe the working pattern which you would like to work in future (days/hours/times):

2.3 Proposed date of commencement of new working pattern:

**3 Impact of the Request**

**3.1 I think that my request will affect my employer and colleague(s) as follows:**

**3.2 I think the above effect on my employer and colleague(s) can be dealt with as follows:**

**DECLARATION**

I declare that the information given above is true and complete.

**Signature of Employee:** \_\_\_\_\_ **Date:** \_\_\_\_\_

*Completed forms should be forwarded to your line manager for action*

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**Signature of Line Manager:** \_\_\_\_\_ **Date:** \_\_\_\_\_

**Signature HR Representative:** \_\_\_\_\_ **Date:** \_\_\_\_\_

HUMAN RESOURCES TO LOG AND ACKNOWLEDGE REQUEST

**SECTION B: LINE MANAGEMENT ASSESSMENT**

**Note: Applications should be assessed no later than 20 working days from receipt of request.**

The following factors must be considered prior to making a decision

FACTOR	ASSESSMENT
Has the employee presented a valid work-life balance reasons for their request?	
Are there any potential advantages to be gained for the Council?	
Would agreeing to the request have a detrimental effect on ability to meet customer demand? If so could actions be taken to address this?	
What impact would approving the request have on arrangements to cover absences/holidays/training etc?	
If applicable, could work be re-organised among existing staff?	
Could additional staff be recruited?	
Would agreeing to the request have a detrimental impact on quality or performance? If so could actions be taken to address this?	
If applicable, is there sufficient work during the periods the employee proposes to work?	
Are there any structural/other changes planned which have a bearing on the request?	
Are there any other issues to be considered in making a decision which have not been covered?	

**LINE MANAGEMENT RECOMMENDATION**

Having considered the above factors my recommendation is as follows:

1. To approve the application in full

2. To approve the application in part as detailed below

3. To reject the application for the following reasons

**Proposed Commencement Date for new arrangements:**

**Do you recommend that the new arrangements be applied on a trial basis initially?**

Yes:  No:

**If so please indicated review date:**

Further Actions Required (if applicable specify action and responsibility)

**SECTION 5: APPROVALS**

**Signature of Line Manager:** \_\_\_\_\_ **Date:** \_\_\_\_\_

**Signature of Asst Director:** \_\_\_\_\_ **Date:** \_\_\_\_\_

**Signature of Director :** \_\_\_\_\_ **Date:** \_\_\_\_\_

Received by Human Resources:

\_\_\_\_\_  
Human Resources

\_\_\_\_\_  
Date:

**SECTION C: EMPLOYER OF CHOICE PANEL APPROVAL**

**Note: The panel should consider the request no later than 10 working days from receipt of request from the line manager.**

**Composition of Panel:**

Name	Title

**Date of Meeting:** \_\_\_\_\_

Comments on the line managers assessment of the request:

Comments on the line managers recommendation:

**PANEL DECISION**

Having considered the above factors the panel has decided:

- 1. To approve the application in full.
- 2. To approve the application in part as detailed below:

3. To reject the application for the following reasons:

Any other comments

**Panel Signatures:**

Name	Title	Date:

**NOTE: The decision of the panel is final and binding on all parties. Employees whose requests are rejected may seek feedback which would assist in any future requests.**