



## 2003/4 TASKS FOR SCHOOLS

- Routine delegation of non-teaching tasks
- Leadership and Management Time for teachers
- Introduction of work/life balance issues

This **Newsletter** primarily deals with the **WORK/LIFE BALANCE** issues for schools arising from the **SCHOOL WORKFORCE REMODELLING** programme.

### THE LEGAL/CONTRACTUAL FRAMEWORK

Arising from the Workload Agreement, the **Teachers' Pay and Conditions Document 2003** includes a requirement that all teachers should enjoy a reasonable work/life balance.

**Paragraph 51.3** places a specific responsibility on Headteachers to:

"....have regard to the desirability of teachers at the school being able to achieve a satisfactory balance between the time required to discharge their professional duties including in particular ... their duties under paragraph 67.4 (hours in addition to the 1265 directed time annually) and the time required to pursue their professional interests".

A similar duty is to be placed, by Regulations, upon Governing Bodies in respect of the Headteacher.

**Paragraph 64.7** relates to the working time of teachers and has been amended to read:

"Such a teacher shall [in addition to 1265 hours directed time] work such **reasonable** additional hours as may be needed to enable him to discharge his professional duties...".

For other staff not subject to 1265 hours, the Document requires that overall hours should also be reasonable.

It is also important to remember that the Green Book (Conditions of Service for Local Government Staff) negotiated by LEAs and trade unions and covering support staff, also requires a commitment to maintaining a reasonable work/life balance.

There is also a common law and legal duty regarding health and welfare of employees under health and safety legislation and working time regulations. Thus all parties in the Education service, Governors, Heads, LEAs, employees and trade unions have a part to play in work/life balance issues.

### NORFOLK'S WELL-BEING STRATEGY

Norfolk schools have had access to the successful Well-Being Programme for many years. This programme will greatly assist schools in meeting their obligations under the Raising Standards and Tackling Workload national agreement. Schools that are interested in joining the Well-Being Programme should **contact Paula Amis on 01603 222326**.



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## **WHAT IS WORK/LIFE BALANCE?**

Work/life balance can mean different things to different people and this makes it very difficult to define. In the context of the Workload Agreement, the focus is clearly on reducing working hours and workload and thereby to reduce the associated burdens and stress upon staff. The successful implementation of the Workload Agreement, with the associated reduction in work, will in itself contribute to a better work/life balance for staff. This in turn should enable teachers to improve the quality of teaching and learning for their pupils.

It is also about a more general desire for employees to have control over their lives and to manage the demands and expectations of modern life by achieving harmony between their work and private commitments.

However, it is also important to be aware that work/life balance is not about schools having to accommodate, for example, every employee's wish for time off and flexible working. It is about mutual flexibility which does not unreasonably impact on the school's and pupils' needs and accommodates the reasonable wishes and needs of employees.

In general terms, achieving a reasonable work/life balance may mean a consideration of the following issues.



### **Flexible working: e.g.**

- Part-time, job share;
- Term-time working, annualised hours;
- Flexi-time;
- Home-working.

### **Flexible absence: e.g.**

- Sick leave
- Parental leave;
- Compassionate leave;
- Holidays.

### **Working Culture – ‘Working SMARTER not harder’**

- Expectations, either direct or implied (e.g. by example), of the school/managers;
- Expectations that staff have of themselves or choices that individuals make;

e.g.

- Working hours;
- Timing of meetings, training, etc;
- Start and finish times;
- Workload (including working at home);
- Breaks;
- Equalities.

**Facilities and benefits** (NB: not necessarily paid for by the school but facilitated by it, e.g.

- Health and safety, training and development;
- Provision of laptops for use at home.

## **BENEFITS TO SCHOOLS**

Work/life balance can be seen as something that benefits employees, but which is rather inconvenient and some would say, at times, detrimental to the employer. However, research has shown that there are a number of real benefits to schools as employers of operating effective work/life balance strategies.

<b>Good employee relations – a motivated and committed workforce</b>	<ul style="list-style-type: none"><li>• Reputation of school as a good employer;</li><li>• Mutual flexibility – a school that looks after its staff gets the best from them.</li></ul>
<b>Better recruitment and retention</b>	<ul style="list-style-type: none"><li>• Access to a bigger potential pool of applicants by offering a range of work options/patterns;</li><li>• Employees that are happy and have flexibility are more inclined to stay.</li></ul>
<b>Reduced absenteeism and a more productive and focused workforce</b>	<ul style="list-style-type: none"><li>• Staff are less likely to be stressed and ill;</li><li>• Employees who are afforded time to deal with issues outside work are more likely to be 100% focused when they are at work.</li></ul>
<b>More flexibility to meet schools' demands</b>	<ul style="list-style-type: none"><li>• Mutual flexibility enables peaks and troughs in demand to be met;</li><li>• Already exercised through term-time working for example;</li><li>• Reduced overtime costs.</li></ul>

**It would, of course, be wrong to suggest that there are not some challenges for schools.**

### **- A FLEXIBLE WORKFORCE CAN:-**



- Take more organisation;
- Sometimes make it difficult to meet demand if staff are unable to commit to certain working patterns/times and when staff are absent;
- Leads to a perception by those that are happy with their work/life balance that they are 'carrying' the work of those who work reduced hours or are absent.

### **- THE PROVISION OF SOME FACILITIES AND BENEFITS CAN HAVE A COST – EITHER FINANCIAL OR TIME.**

### **- IT CAN BE DIFFICULT TO CHANGE THE ORGANISATIONAL AND INDIVIDUAL CULTURE – THIS NEEDS COMMITMENT AT EVERY LEVEL.**

**However, the key to establishing an effective strategy is to embed practices that both schools and the employees are familiar and comfortable with and which become the 'norm' rather than a procedural burden.**

## WHAT ARE THE KEY ISSUES TO CONSIDER WHEN DEVISING A SCHOOL STRATEGY

### GENERAL

<b>Demands, expectations and priorities change over the period of an individual's life.</b>	<ul style="list-style-type: none"> <li>• People with children usually have different demands and these change as the children grow older;</li> <li>• People who have worked for many years may want to enjoy more time away from work for personal development or for pleasure.</li> </ul>
<b>Demands, expectations and priorities are different for each individual.</b>	<ul style="list-style-type: none"> <li>• Some people have elderly or sick dependants, some have children, some suffer ill-health themselves and others have no commitments outside of work and live for work;</li> <li>• Some people relish autonomy at work while others prefer clear direction and supervision.</li> </ul>
<b>Demands, expectations and priorities may be long term or transient.</b>	<ul style="list-style-type: none"> <li>• People with children have long term commitments, others may suffer crises in their personal life which last a relatively short time but are very demanding.</li> </ul>

### FOR WORK/LIFE BALANCE

### EXAMPLES

<p><b>Consideration of work/life balance must be in the context of the school's needs; but this needs to be balanced with rights, needs and wishes of individuals</b></p> <ul style="list-style-type: none"> <li>• Clearly, a school has core service hours and a responsibility to children and parents during those hours.</li> </ul>	<ul style="list-style-type: none"> <li>• A teacher cannot teach at home but could do planning at home;</li> <li>• A teaching assistant must have core attendance hours but a bursar may have more scope to work flexible hours or at home.</li> </ul>
<p><b>There must be mutual flexibility</b></p> <ul style="list-style-type: none"> <li>• Schools and employees must work together to find an acceptable balance for each other.</li> </ul>	<ul style="list-style-type: none"> <li>• Term-time working suits some posts as it meets schools' demands and some employees who have child care commitments;</li> <li>• Some staff may prefer the greater flexibility of all year round working and contracts.</li> </ul>
<p><b>One pattern does not fit all – a mosaic workforce</b></p> <ul style="list-style-type: none"> <li>• All posts should be approached with an open mind – do not assume full-time working is a necessity.</li> </ul>	<ul style="list-style-type: none"> <li>• Schools may have every type of worker, even in the same role, for example, office staff may be full or part-time, on annualised or flexi hours' contracts.</li> </ul>
<p><b>Balance individual needs against those of others</b></p> <ul style="list-style-type: none"> <li>• Flexibility for individuals must not have a disproportionate effect on others' workloads nor excuse individuals from appropriate roles or responsibilities.</li> </ul>	<ul style="list-style-type: none"> <li>• Be cautious of overburdening other staff when individuals have time off – don't overwork the willing!</li> <li>• Ensure fair distribution of work – do not always turn to the full-time staff just because they are there all the time.</li> </ul>
<p><b>Manage perceptions and manage absences</b></p>	<ul style="list-style-type: none"> <li>• Full-time staff may perceive those who work part-time/term-time as doing less work and as having to have their work 'covered' when they are not there – <i>but</i> they are also paid for less time;</li> <li>• Absences must be managed and be reasonable in the context of the role – levels of absence, however legitimate the reason, can become unacceptable.</li> </ul>
<p><b>Treat staff according to their roles and responsibilities not their working pattern</b></p>	<ul style="list-style-type: none"> <li>• A part-time employee has the same status as a full-time employee and should be afforded the same level of responsibility and access to promotion, training and development opportunities;</li> <li>• Arrange meetings/training so that all staff have equal access or vary the pattern of delivery to meet all needs.</li> </ul>

## FOR WORKING CULTURE

## EXAMPLES

### Leading by example

- The working culture is usually set by the Headteacher and other managers either:
  - Explicitly, e.g. in determining start and finish times, allocating work; or
  - Implicitly, e.g. by coming in early/leaving late (or vice versa!), taking work home.

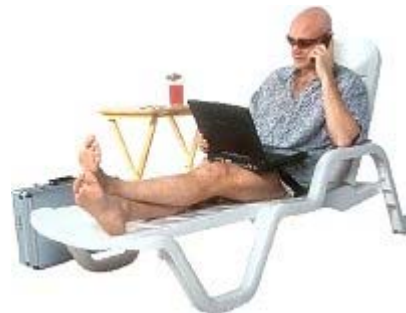
- Staff often feel obliged to mirror the working culture of their Headteacher/manager or their senior colleagues and can themselves, or be made to, feel ineffective if they do not conform;
- It might reasonably be expected that Heads/managers work harder and longer than other staff, but they are entitled to a reasonable work/life balance too!

### Effective Management

- Legal restrictions on working time and ensure staff have adequate breaks;
- Allocate reasonable workloads;
- Monitor and manage stress levels, apply flexible working policies effectively;
- Effective organisation in discussion with staff;
- Promotion of equality.



- Monitor and manage peaks and troughs, facilitate team working;
- Are meetings necessary, do they always have to be after school, do they have to be as frequent, does everyone have to attend?
- Can meetings be time limited (e.g. 1½ hours max.), are there written agendas and are action points (by who and when) minuted?
- Can Governors' meetings be at reasonable times (e.g. late afternoon and less frequently)?
- Can training be undertaken differently, do all staff have to come into school on non-pupil days or can they work at home?



### Empowerment

- Staff must be enabled, encouraged and assisted in taking responsibility for facilitating their own work/life balance.

- Effective time management to enable effective working;
- Teachers must manage the timing and quantity of work outside directed time themselves;
- Staff must be able to question and in some cases say "no".



## **DEVISING AND IMPLEMENTING A WORK/LIFE BALANCE STRATEGY**

The fundamental part of achieving a successful strategy is that work/life balance issues become part of the culture of the school. As with any cultural change, this requires everyone to 'buy-in' to any changes and this requires:-

- ❖ Consultation
- ❖ Implementation
- ❖ Communication
- ❖ Evaluation
- ❖ Adjustments, as required.

**In order to develop an effective strategy it is necessary to know your starting point and your goals. This will enable the development of an action plan.**

### **STAFF VIEWS**

The fundamental tool for successful implementation of the workforce reform is discussion with the whole staff group to share ideas and work together to find workable solutions. This not surprisingly then is a good starting point for addressing the issue of work/life balance.

This may be achieved by one, or a combination, of the following:-

- Establishing a working group within the school or consortia groups;
- Focusing on work/life balance issues at a training day or staff meeting;
- Asking staff to complete a questionnaire (an example can be obtained from [virginia.wakely@norfolk.gov.uk](mailto:virginia.wakely@norfolk.gov.uk) Remodelling Project Officer in Norfolk) or entry to the Norfolk Well-Being Programme will include the completion of a questionnaire under a thorough planning and review process;
- Individual discussion at performance management/appraisal meetings;
- Where there are trade union representatives at schools they should be encouraged to participate in any working groups.

Information needs to be gathered from a range of angles, i.e. :-

- What is currently in place?
- How widely are existing practices known and applied?
- What do staff want?
- How might this be achieved?
- What are the inhibitors?

### **THE NEEDS OF THE SCHOOL**

Clearly, getting the balance right is not just about the employee's work and private life but also about meeting the needs of the school. It is, therefore, tempting at this early stage to consider the parameters of the school's needs. However, central to the Workload Agreement is the theme of working differently – and this encompasses everything from the structure of the working day, to the tasks that are carried out and importantly by whom they are undertaken. Heads/managers should, therefore, avoid creating absolutes in terms of what the school's needs are and be prepared to work with staff, collectively and individually, to achieve a mutually acceptable balance between the school's and the individual's needs.

However, a work/life balance strategy must be designed to contribute to the school's aims and objectives and these need to be clear from the outset. The optimum objective is clearly the provision of a high quality education service and the achievement of this includes:-

- ✓ Recruitment and retention of capable staff;
- ✓ Staff motivation and commitment;
- ✓ Maintaining good staff health and attendance;
- ✓ Staff who are adequately trained and developed;
- ✓ Successful implementation of the Workload Agreement.

### **OTHER DATA**

In order to be able to measure the effectiveness, particularly from the school's point of view, of any work/life balance strategy, some base data needs to be available, i.e. :-

- Sickness levels;
- Absence levels for other reasons
- Turnover.



Other, less tangible, base data may be obtained via the questionnaires, i.e.

- How stressed staff feel;
- How happy they are working in their role, and in the school.

**An effective work/life balance strategy will be manifest in both practice and policy.**

## **POLICY DEVELOPMENT**

There are a number of key policies/procedures which directly support work/life balance principles and schools are recommended to ensure that there are in place:-

- ❑ Leave of Absence policy;
- ❑ Flexible Working policy;
- ❑ Sickness Absence policy/procedures;
- ❑ Equalities policy.

**A revised model Leave of Absence policy, incorporating flexible working issues and new Sickness Absence policy/procedures will be issued during 2004 by Education Personnel Services.**

In addition, work/life balance issues need to be incorporated into other policies/procedures either explicitly, or as part of their execution:-

- ❑ Induction and Probation procedures;
- ❑ Recruitment procedures;
- ❑ Performance Management
- ❑ Training and Development.

Work/life balance strategies should also be evident in school improvement and staffing plans.

**A successful work/life balance strategy will depend upon effective communication**

- The success of a work/life balance strategy will depend upon it being led by example. Heads/managers need to ensure that staff know that they are valued and supported.
- Good employers attract good staff and flexibility and looking after staff are high in people's definition of a good employer. So tell potential employees in your recruitment pack that you are committed to supporting the achievement of a reasonable work/life balance.

- Include discussion about work/life balance issues during induction, performance management/appraisal and career development discussions. This serves several purposes. It ensures that the strategy and associated policies are understood. It provides a mechanism for individual needs and wishes to be considered and provides an opportunity to reinforce the cultural expectations if necessary and to monitor expectations and how well they are being met.
- Staff should be consulted about all policies and procedures prior to formal adoption by the Governing Body and all staff should be made aware of, and given access to, all relevant policies and procedures adopted by the school.
- All relevant parties should be kept informed of new developments and involved in monitoring, evaluations and reviews.

**Individual and organisation needs naturally change over time and there is a need to change where improvement is not achieved**

Evaluation of hard and soft data will help to:-

- Measure effectiveness, efficiency and cost;
- Measure benefits to the organisation and individuals;
- Measure impact on achieving goals and targets;
- Raise awareness of what works and what doesn't and identify when alternative solutions may be desirable.

Review will be an essential ongoing process – both in terms of the organisation and individuals.

## **FURTHER ADVICE SOURCES**

- ☺ **Norfolk's Well-Being Strategy Team** can help as indicated above.
- ☺ **Norfolk's Schools Personnel Handbook** has advice on relevant personnel policies, including job share arrangements.
- ☺ **The Investors in People Work/life Balance Model** is a practical way to help employers to get to grips with the issues. Contact your local IIP Team or [www.investorsinpeople.co.uk](http://www.investorsinpeople.co.uk).
- ☺ **The Teacher Support Network** is working within education to assist schools in well-being issues. Their website is [www.teachersupport.org.uk](http://www.teachersupport.org.uk). Norfolk's Well-Being Team has traditionally had close links with the Teacher Support Network.
- ☺ **The DfES** has a good practice guide at [www.teachernet.gov.uk](http://www.teachernet.gov.uk).

## FEEDBACK

The LEA would be interested in receiving feedback from schools on these newsletters, including work/life balance issues covered in this edition, particularly where the staff have either completed the (example) questionnaire; or there are any examples of good practice already taking place to enhance the work/life balance of the school community. Please contact the Newsletter Editor, Ray Philpott, on 01508 558821 or via e-mail at [ray.philpott@norfolk.gov.uk](mailto:ray.philpott@norfolk.gov.uk).

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