



## “OURTIME” – A WORK-LIFE BALANCE PROJECT

### 1. Organisations involved

The Inland Revenue

### 2. Description of the case

#### 2.1. Introduction

The Inland Revenue needed to extend its opening hours to the public to provide a more accessible service. The Revenue also wanted their staff to have a better balance between work and personal life. The answer was 'OurTime' – a partnership between the Revenue and the Public and Commercial Services (PCS) Union, which gives staff options about their working hours and allows Revenue offices to open outside conventional business hours and at weekends.

The 2000 Modernisation Agreement committed PCS and the Inland Revenue to finding ways of working together to deliver better public services whilst safeguarding members' jobs.

Work arrangements have changed over recent years and there is a need to find imaginative ways to organise work to meet business and customer requirements as well as to give people choice and flexibility. This is essential for an increasingly diverse workforce and customer base. Increased flexibility can:

- provide practical (and possibly financial) help with childcare or other care responsibilities;
- help with the cost or difficulty of travelling to work e.g. by avoiding peak time travel or by homeworking;
- give people more control over their working life (instead of feeling controlled by it);
- provide opportunities to vary working patterns to meet social, educational or lifestyle choices – or simply to have more time to yourself.

In 2001 PCS and the Inland Revenue launched a partnership pilot project in Sussex to promote worklife balance – the OurTime project. OurTime project was a response to the challenge of delivering a more accessible service and extending opening hours to the public, whilst at the same time helping staff to balance work and personal life. Stakeholders include employees, their families, managers, Inland Revenue, PCS Union and customers.

One of the main objectives of the project was to improve the morale and motivation of staff, and to make the Inland Revenue in Sussex an attractive employer to work for. The intention was that the lessons learned in the Sussex Area would benefit the whole of Inland Revenue.

#### 2.2. Aims

The idea was:

1. to give staff greater choices about their patterns of working and
2. to increase public access to the Inland Revenue's services through more flexible opening hours.

A key element of the project was to develop partnership working at a local level on practical issues of immediate relevance to both staff and management. PCS, the Inland Revenue and the Trades Union Congress (TUC) ran the project in partnership. PCS representatives were part of the project team and were key players in communicating the benefits of the scheme to their colleagues. A project director was appointed from the TUC.

First, Inland Revenue and PCS investigated staff needs through surveys and focus groups. They also identified and tested customer needs. Then, they developed and piloted new ways of

The logo features a stylized white 'e' on a blue background, followed by the words 'CASE STUDIES' in large, white, sans-serif capital letters.

working at three different offices. The piloted actions included compressed working weeks, variable core time and 'banking' time. Training packages were also developed and piloted. Inland Revenue trained managers and staff in organising work for flexibility and security, and team members to work together more effectively.

A typical flexible working hours scheme contained the following components as part of flexi-time: coretime, bandwidth, lunch breaks, accounting period, and flexi-leave. Other contractual working pattern options included: part-time working, job-sharing, part year appointments, term-time working, distance working and homeworking, and annualised hours.

It was important that the arrangements follow Working Time Regulations in UK and that a risk assessment was carried out. An assessment should be reviewed if any significant change occurs – this can include changes to when or where people work. The Revenue still has the same duties under health and safety legislation if employees work at home. This means that managers must consider health and safety aspects before approving homeworking.

Homeworkers also need risk assessments and are expected to take reasonable care over their health and safety.

Security of staff, especially in relation to extended opening hours, needs to be considered carefully. Similarly, it is important that employees and managers look at ways to make sure that employees are kept fully in touch with the rest of the office if their working pattern means that they are not there at peak times.

It was decided early in the project that learning would be an important element. The development of new learning opportunities for staff was a key area. It provided union and management with an ideal opportunity to develop a joint approach on an issue of interest to both sides. It also helped contribute to one of the key aims of the project: to improve the morale and motivation of staff, and to make the Inland Revenue in Sussex an attractive employer to work for.

The project involved the introduction of learning centres, which provide free on-line learning opportunities through the PCS Learning Services and learndirect (<http://www.learndirect.co.uk/>). Staff have free access to computers during the working day for both vocational and non-vocational courses. There are agreed guidelines on courses that staff can access during work time.

Other courses were available during the working day but access was part of the flexi-time agreement – so, for example, staff could learn a language or even do a course on bee-keeping at any time during the day, subject to service needs.

More open communication with the management was a central part of the project. It means letting the team know what the business aims are and involving them in organising work and resources to achieve the best results. The manager has an important role in setting the direction and monitoring progress. The manager's role is to:

- Ensure all team members have clear business objectives;
- Be aware of the range of working patterns available and, with the team, explore ways to have greater flexibility to improve work efficiency and individual work-life balance;
- Consider requests to change working patterns in the light of the department's policy and to base operational decisions on:
  - the requirements to deliver work and meet targets efficiently and improve customer service standards
  - the needs of other people working in the office or section
  - the department's diversity and equal opportunities policies.

The manager also has to balance the needs of individual members of a team, being as fair as possible to everyone. Team working, particularly in teams which take on a degree of self-management, can enhance individual commitment and accountability and can give greater

# CASE STUDIES

flexibility to achieve better results. This is especially true if team working is combined with imaginative use of different working patterns. Finally, managers need work-life balance too, and when teams are working effectively everyone benefits, including the business.

## **2.3. What was done, and how?**

The action had several health and safety benefits. Staff were better able to balance their work and personal commitments, leading to better stress management. The action has also improved management and staff morale. Further benefits include increased trust between the Revenue, the union and its workforce as well as wider potential for recruiting high calibre staff by becoming a more flexible employer. Better use of IT systems and accommodation led to lower unit costs. The project gave more opportunities for learning or other activities. The three-office pilot provided a process model for the rest of the Inland Revenue and other organisations. Finally, customers benefited from longer opening hours, with increased coverage at peak times.

By developing a greater choice of working patterns the OurTime project supports the department's business direction and diversity policies, with the underlying aim of helping staff to have a more satisfying and productive work-life balance.

Successful implementation of flexible working arrangements depends on people's willingness to make it work in a way which benefits the whole team. Business outputs and customer service must be delivered but there is usually scope for managers to meet people's reasonable needs for flexibility in the way they work.

Staff clearly benefited from the project. Some benefits – such as better use of office accommodation – might not be immediately visible. The staff benefits have rejuvenated expectations around working patterns within the organisation acknowledging that 'one size doesn't fit all'. The Revenue has not been able to quantify these intangible benefits. The main financial outlay was £ 60,000 (EUR 54.400) for the salary, travel and subsistence costs of the project manager. The PCS and TUC do not see OurTime as a definitive model, but hope that the experiences and lessons of the project will help others to develop their own innovative approaches. Their websites give assistance to others who are planning to run similar projects. Among other things, they provide a useful checklist of possible problems ('watch out for') in the areas of partnership working, planning and control, funding, staff, communication, customers, pilots, learning/training, learning centres or zones. They also provide some solutions ('how to').

The project had both local and national impact. On a local scale, the PCS and TUC are examining how it affected the offices and people involved. Nationally, they are exploring the wider impact of the project as an adaptable model for flexible working.

## **2.4. What was achieved?**

Finally, there were important lessons learnt from this project. The results showed that the process of achieving agreement on work-life balance and the re-organisation of work requires:

- Commitment to improving the organisation of work by each level of management, from supervisor to chief executive, union representatives and all grades of staff
- Understanding what it means for management, unions and workforce: productivity and profitability, job security, job satisfaction and working time
- Trust which is built by working in partnership to identify and solve problems jointly
- Representation from all groups of staff who will be affected
- Involvement through the widest possible consultation so that staff have the opportunity to contribute to solutions
- Listening to aspirations and expectations

# CASE STUDIES

- Considering ideas seriously – recognising that every idea, including the ones you don't like, needs to be examined
- Transparency by keeping staff fully informed
- Testing solutions – it is usually best to test new practices through a voluntary pilot study where staff are able to revert to existing terms and conditions if they wish
- Action on possible solutions rather than shelving the issue until it's too late
- Confidence in a positive outcome.

## ***Problems faced***

The Inland Revenue and PCS acknowledged that there were some problems in their partnership. These problems were related to the following factors:

- An adversarial culture
- Response to Government modernisation agenda
- Changes in traditional management structures and lines of communication
- Differences between national and local concerns
- Divergent aspirations of management and workforce
- New ways of working together.

In recent years the Inland Revenue has encouraged staff to be involved in the change process. Creating a genuine partnership with PCS, at both national and local level, was a greater challenge because there were no guidelines and because historically industrial relations were often based on adversarial structures and attitudes. In Sussex, the changes brought about by new Area Management had fractured existing channels of communication. As a result, the project started at a difficult time when both sides were responding to fundamental change and were facing many conflicting demands.

## ***2.5. Success factors***

To be effective, the project team needs to work together on an equal basis. There was considerable wariness at the initial meetings. There was still a traditional expectation of disagreements and conflict between employers and trade unions, particularly as a result of re-organisation. However, this gradually changed into a high degree of mutual trust and respect in the team.

It was established very early on how crucial the question of trust was going to be. A day of 'getting to know you' was arranged for union reps and management to discuss expectations and concerns. Ironically, there seemed to be greater affinity between management and union at local level than between local and national levels of the union itself. Trust had to be strengthened within PCS itself.

Senior management acknowledged that their commitment and involvement was essential to the success of the project. The project needed a business focus that matched benefits to staff with business benefits. Local PCS representatives knew that management wanted to extend opening hours but in a way that provided benefits to staff as well. It was therefore vital to achieve an early 'win' for staff in order to overcome any initial hostility to the project. This would also help to increase confidence and support for new ways of working with management and representing their members. A major problem for the union at local level was to keep sceptical members on-side. Some union scepticism was overcome by Inland Revenue's agreement to support learning access points that were run by the PCS in local offices as part of the project.



## **2.6. Further information**

Contact information:

TUC

Jo Morris

Email: [jmorris@tuc.org.uk](mailto:jmorris@tuc.org.uk)

## **2.7. Transferability**

In industrialised countries, high quality goods and services are often demanded outside of normal working or opening hours. Competitiveness, flexibility and quality services are key concepts in the organisation of work today, as are job security, job satisfaction and fairness. The successful employer, private or public, has to deliver on all these. This means:

- involving staff in decisions about change
- making sure their needs and aspirations are considered
- winning their commitment to new ways of working.

This initiative can easily be applied in other countries and other sectors of public service. However, many companies/public services might not accept learning activities that are not relevant for the job.

Employers are free to adapt the TUC 'changing times' process to their own circumstances, but they should always credit the TUC when they do so.

In sum, this is a good example of a public sector initiative that benefits a large number of people and also has clear business benefits: 'A decent quality of working life, where people have some choice and autonomy over their working hours, is an essential prerequisite for any effective, modern organisation.' (Jo Morris, Project Director).

## **3. References, resources:**

Sources and further information:

- <http://m.hse.gov.uk/business/casestudy/irpcsu.htm>
- [http://osha.europa.eu/en/publications/reports/mainstreaming\\_osh\\_business](http://osha.europa.eu/en/publications/reports/mainstreaming_osh_business)