



Lessons from the Workplace Project

➤ AN EVALUATION OF A WORK-LIFE BALANCE
PROGRAMME INITIATIVE



Acknowledgement

Prepared for the Department of Labour
Innovation & Systems Ltd

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EXECUTIVE SUMMARY

Overview

The Government established the Work-Life Balance Project in 2003 to develop “an integrated and coordinated policy programme to promote a better balance between paid work and life outside work.” The Department of Labour initiated a Work-Life Balance Programme in 2004 including a broad-based survey of needs and issues and other policy work.

A key element of this programme was the “Workplace Project” originally conceived as an action-research project. A mix of 14 public and private enterprises were selected to receive consultant and other support in undertaking a range of work-life balance projects that would be of benefit to them. This was also intended to inform the development of tools and resources and to assist the Department to better understand the interaction between policy and practice in this field.

The Project was also based on principles of partnership between employers, unions and the Government with the intention of achieving “win-win” solutions for all involved. A fuller description of the Workplace Project and the participating organisations is in appendix 1.

In 2007 the Department began an evaluation of the Workplace Project. This was not intended to be formal audit of the Project, but rather an exercise to draw out the lessons learned from it – what worked, what didn’t, what momentum it created, what factors contributed to positive results, what the experiences of these organisations contributed towards the preparation of generic resources and toolkits that can promote work-life balance more widely and so on.

The evaluation was carried out in two stages by Innovation & Systems Ltd. This summary represents an amalgamation of the findings from the two stages. The full reports for both stages are attached to this summary.

The aim of the evaluation was to examine:

1. the **process** used, including those parts of the process that were successful, intended and unintended outcomes of the process, and an assessment of what parts of the process might be improved or done differently;
2. the **impact** of the initiatives, against specific measures set by the organisation, or against expected outcomes, and on factors such as morale, productivity, communications, absenteeism, recruitment, staff turnover, hours worked and so on; and
3. the **sustainability** of work-life balance initiatives in workplaces over the longer term.

The first stage of the evaluation, undertaken in 2007, covered six of the participating organisations. These were Christchurch Casino, City Care, the Education Review

Office, EziBuy, Indeserve and Tip Top Bread. The six organisations were chosen by the Department on the basis that they were furthest along with implementation.

In 2008 the Department extended the evaluation to cover a further four organisations - Compac Ltd, Hutt Valley Health, Kirkaldie and Stains Ltd, and the New Zealand Police.

In addition to extending the catchment to see if there were insights and lessons that had not been captured in the first report, the extended evaluation explicitly aimed to identify the differences between the experiences of these four organisations and those of the other six with special regard to the features of:

- a large public sector organisation with a wide range of occupations and work practices;
- a company with a hi-tech export focus;
- a process that was aligned to other changes taking place in the organisation; and
- an emphasis on management seeking to independently identify the initiatives that could be taken to improve work-life balance.

The progress of the final four organisations will not be evaluated as the general validity of the findings from the first stage has been confirmed by the findings from stage 2. Descriptions of all organisations participating in the Project are in the stage 1 report.

Method

The method adopted by the evaluation team for both stages involved developing a model of what success would look like based on the perspectives of different stakeholders. These stakeholders included the Department of Labour, Business New Zealand, the New Zealand Council of Trade Unions and the consultants who worked with the participating organisations.¹

The evaluation team then conducted interviews with a representative (given resource limitations) cross-section of the selected enterprises to gain an understanding of the actual experience of their work-life balance projects. The overall findings of the evaluation are a reconciliation of this “top-down and bottom-up” approach. In addition the aim of stage 2 was to see if there were insights and lessons that had not been captured in the first stage and to explicitly identify the differences between the experiences of the organisations in stage 1 and stage 2.

What constitutes success?

While there are obvious differences between the stakeholders as to what constitutes “success” there is significant common cause around what “success” would look like.

¹ These were Top Drawer and Right Management.

Six common themes emerged. The table below sets these out and compares them with the results from field work.

Table 1: What success looks like - common themes

Expectations	Result
Work-life balance should not be seen as a self-contained policy objective but as one element of a broader objective of improving the performance of workplaces by changing the way work is organised and done.	There is some value in separating out specific concepts/policies for particular attention especially in the early stages of their promulgation, to differentiate them from more generic programmes. Once more widely adopted it is easier to integrate such initiatives into broader based programmes.
A critical success factor for this project was whether it improved understandings among the participants of the sorts of instruments and interventions that work in the special circumstances and cultures of New Zealand workplaces.	A number of relatively straight forward instruments and interventions were used which highlighted the importance of enabling greater flexibility in work arrangements and communicating them to staff as well as facilitating access to them, as a means of improving the overall work experience. The project also highlighted the value of simple processes of dialogue and discussion of workplace issues between managers, staff, and unions (where present) which can have utility as a way of working, beyond any particular project.
It is important to maintain momentum and to introduce changes that are sustained and not episodic.	There were uneven outcomes with some projects adopting processes that will facilitate on-going attention to work-life balance issues (perhaps resulting in cultural change over time) and others adopting a project approach which is likely to result in more episodic change.
Changes in work organisation need to be – and to be seen to be – mutually beneficial.	Most projects have resulted in mutually beneficial change, even if it is relatively small scale. However, any change still seems to have to fit in with the employers requirements rather than be driven by employee need.
Changes should be incremental and additive.	For the most part agreed changes were incremental and additive. This works well and may help to reduce employer anxiety about such initiatives.
The project should have contributed to improved understandings that enable enterprises to manage the continuous change process largely from within their own organisations without excessive dependency on external “expert” advice and guidance.	There was considerable reliance on outside consultant support for both kick-starting and maintaining momentum although where an internal sponsor was identified this has led to much higher likelihood of ongoing and internally driven change.

Key findings from stage 1

Process findings

Within participating enterprises

- Commitment by senior managers to project aims, the process and implementation of project outcomes is pivotal to project success. The evaluation found that commitment was patchy and potentially transient across the project enterprises which is reflected in the outcomes achieved. Projects need a driver/sponsor and someone with authority to make things happen.
- Associated with commitment is continuity of participation by key people. In a number of enterprises, management turnover proved disruptive and in one case, fatal to project success. Of course this is difficult to achieve over the life of lengthy projects. Related to this was the proven value of perseverance and “staying with the programme” despite distractions and obstacles along the way.
- Selecting the right project for the enterprise, particularly one that contributes to real business issues (i.e. “main-streaming”) rather than a project that is “nice-to-have” and that can be siloed is important (for all project partners). There was a tendency for projects to focus on working hours, shift patterns and leave. However, where projects affected the overall quality of the work experience and touched on the organisation of work, small changes were often capable of achieving significant improvements in work-life balance. Selecting the “right” project together with building key manager support for it are clearly fundamental requirements for success.
- Finding time for engagement by human resources, management and staff beyond normal duties is always an issue. Projects that are important to the business will attract greater resources, including time. Participatory processes only work if there is time for them and it is paid for. Ultimately what is given resource is management’s call, thereby again emphasising the importance of their commitment. However, once this is obtained, employees tend to reciprocate with their own efforts, often putting up with significant personal inconvenience.
- In most cases simply undertaking the project, starting with employee surveys, helped to raise awareness of work-life balance issues in the workplace. Interestingly though, awareness of work-life balance in its own right might detract from the preference for “de-branding” and incorporating it into more seamless and broad workplace improvements.
- Developing databases through employee surveys provided a good evidence base from which to develop objectives and plans. Often this was supplemented by interviews and other forms of data collection. However, there were different experiences with the survey often reflecting assumptions about workforce literacy levels leaving an impression that the survey was more aligned with research as opposed to action.

- Managing expectations is always an issue with projects of this nature and a balance needs to be struck between setting realistic objectives and raising expectations and then underachieving, with a consequent rise in disappointment and workforce cynicism. On balance we find that it is better to start out with realistic expectations and perhaps over achieve. A number of projects ended up “under-shooting” their initial target although they achieved small gains that have had a larger than expected ripple effect.
- Communication problems in enterprises are ubiquitous and it was difficult to judge whether communication issues were specifically a problem with work-life balance procedures or were more systemic. Particular problems were experienced in some cases in defining the role of the union in setting up projects and getting clarity around the expected contribution of union organisers.
- Producing a project “plan” was often seen as the end point of the exercise with uncertainty over who was responsible for what happened next. In some cases this was due to the long lead time in producing a plan, which highlights the importance of maintaining momentum (and interest). In other instances, inexperience with project processes was the probable cause.
- Workgroup processes and experience were variable, often depending on some of the above mentioned factors, as well as the “fit” between the assigned consultant and enterprise personnel involved in the project. In a number of cases, there were quite high levels of dependency on the external facilitator in driving the project, with the organisation not taking ownership of the process. In those organisations, momentum did not tend to survive the departure of the external resource.

At government project level

- A number of the evaluation findings have implications for project design for the Department. In particular the management of expectations about what can be realistically achieved within specified timeframes in terms of impacts on productivity, business culture and work practices may need to be tempered in future.
- As with enterprise project team turnover, reasonably frequent changes in Departmental project leadership during the course of the project upset continuity of thinking about purpose and led to some altering of expectations. Project handover also inevitably leads to some loss of ownership on the part of incoming personnel. However, it is also apparent that a number of enterprises found the sponsorship by the Department as well as the knowledge, resources and “authority” it brings, to be helpful.
- Consultant selection to achieve a good “fit” with the project enterprise is very important to achieving a successful outcome, as demonstrated by the same consultant being well received by one workplace but less so in another. This is associated with the other critical front-end project investment in time, in assessing enterprise readiness, and in selecting the appropriate project and winning management support for it.

- Developing workplace databases on work-life balance (and other “well-being” indicators) and updating them periodically provides a sound base from which to develop action. This is especially important for managers who are less inclined to want to invest time in exploring hazy concepts. As noted above, it is important that surveys are “fit-for-purpose” in terms of both the questions they ask and the methods they use for capturing data.
- More broadly, this project has generated some useful experience about how government sponsored interventions at a workplace level can work and how such interventions might be more effectively managed in the future.

“Front-end” investment

In summary, a key common theme throughout these findings is the importance of investing significant care, time, and effort at the beginning of projects to help ensure their success. Such investments include:

- Spending enough time clearly defining the workplace issues and ensuring they are sufficiently important to the enterprise to attract the attention of key senior managers (including a project sponsor).
- This front-end work should lead to an appropriate allocation of resources and some agreed and reasonable timeframes.
- Ensuring that the “right” people (influencers) at all the right levels are spoken to so that their perspectives on the issues are heard, they understand the project, and have clear and realistic expectations about what can be achieved.
- These activities should help to locate a project in the “mainstream” of business activity rather than as some adjunct run in parallel.
- Attention to developing participative processes that facilitate staff/management/union dialogue, if genuine and well designed, can lead to spill-over benefits from single interventions.

Impact

- There were relatively few baseline quantitative performance measures extracted at the start of the Project so it is difficult to evaluate the impact in hard cost-benefit terms. However, where hard indicators were used they tended to show little change before and after the project, and/or were explained by other factors in the operating environment. This is understandable: work-life balance is only a small part of the overall operation of any organisation; many of the benefits expected to flow from it are intangible (reduced stress, improved personal well-being) and changed outcomes would emerge slowly over a number of years. Again, this has implications for both the Department and employers in terms of setting expectations and promoting such projects.

For example, the Education Review Office has a tradition of working parties, a formal partnership agreement with the union, and has worked progressively to address work-life balance. Despite this, average hours worked have varied by less than one hour over the last four years, and staff turnover has remained locked in a narrow 11-12 percent band. The nature of the job can dominate work practice, and even if processes make a material and appreciated change to the quality of work, it will not always show up in hard-wired measures.

- Small additive changes were the strongest feature of the responses. Indeed some of the successes quoted did not require any change but simply a clarification of existing entitlements and facilitating easier staff access to them (eg via more aware line managers). Knowing that flexibility can be accommodated and where the boundaries are contributes to greater certainty and a sense of well-being. In this context, enhanced awareness of work-life balance as a real workplace issue was widely experienced. A number of simple and often quite small changes make a real difference!

Small initiatives that were highly valued include:

- ERO changed their vehicle policy to allow garaging at employees' homes before reviews, reducing lost personal time collecting vehicles;
- The Casino clarified and communicated existing entitlements to do with leave and changing shift arrangements;
- EziBuy found out about available childcare and holiday programmes, negotiated employee group discounts for services, and put up information stands with pamphlets about leave entitlements, childcare, exercise programmes etc;
- Tip Top's general manager invited shop floor workers to the corporate box for rugby matches; and
- Compac organised a family outing to the movies.

- There was a tendency for projects to have a relatively narrow focus on hours of work, shifts and leave provisions rather than the wider agenda of the content of work, work processes, and the structure of supports which affect the quality of the work experience.
- For reasons outlined above, there was little evidence of changes in workplace "culture" arising from these projects. Some structural and operational changes may lead to cultural changes over time once they become embedded, but it is unrealistic to expect such change over the life-time of these projects. A further dimension to note is that the project process, in some instances, has led to positive workplace experience of participative processes and joint project work that may be used on other issues in the future. So the potential for significant cultural shifts remains.

Sustainability

- Whether or not these projects have embedded at a workplace level an awareness of work-life balance issues and a predisposition to developing

- initiatives to address them is difficult to determine so soon after their conclusion. However, it is clear that in some cases the ripples created by the project have long-since disappeared while in others the projects have opened up important issues for examination and a search for solutions. How long this momentum can be sustained may depend on management and key staff member turnover as well as how long it takes to find satisfactory answers.
- Overall, work-life balance practices in New Zealand workplaces are not so wide-spread as to have reached a “tipping-point.” However, the cumulative knowledge and learning from this project and other experience does contribute significantly to the resource base from which new and perhaps broader initiatives might be launched. The key issue is whether the will is there amongst tripartite partners to persist with such initiatives. In our view, there is certainly sufficient comfort (albeit with somewhat more realistic expectations about what is achievable) to be drawn from the experience of the Workplace Project by all parties, to justify on-going investment in work-life balance as part of a broader workplace development agenda.
 - Sustaining changes of this nature and maintaining momentum are perhaps the most important challenges in the workplace development arena both within enterprises and for initiating change agencies. Building on and institutionalising knowledge gained rather than having to reinvent processes on each occasion is key.

Key findings from stage 2

The first report noted that because the evaluation covered six of the fourteen participating organisations, there was a risk that it might not have captured all of the lessons that could have been extracted from the Workplace Project.

The evaluators did not think that this was likely because:

- The six organisations were varied by size of organisation, sector (private/public), industry, geographical location, degree of unionisation, ownership structure and workforce characteristics. If there was a slight bias it would be that union densities in the 14 organisations were somewhat higher, on average, than those in the sample.
- While there were some major and many nuanced differences between the sites, our experience was that new insights and contradictions of earlier lessons were subject to diminishing returns, and we were confident that a more extensive evaluation would only have made a marginal difference to these conclusions.

The extended evaluation did generate some additional insights, and these are reported below. However, it did confirm the general validity of these observations in the first report. Significantly, the later evaluation revealed that the results that flowed out of a work-life balance initiative were shaped by the pathway that the initiative followed rather than the institutional structure of the organisation itself.

Extending the lessons learned

Without in any way seeking to detract from the organisation specific experiences, we think that there are six observations that were not quite as clearly expressed in the first stage as was evident in this last round of site visits. In summary:

1. Timing is everything.

It is very difficult to create and sustain momentum on work-life balance if the organisation is not ready for it. This applies particularly to management, because ultimately managers are those with the authority to make changes, but equally if the staff are not sufficiently concerned or motivated to change, a work-life balance project can be seen as going through the motions. The accompanying apathy applies a dead hand to the concept and makes it more likely that it will move down the list of priorities for action.

The implications of this are awkward. It is difficult before the event, to know if the time is right, and resources can be wasted (or generate limited results) if deployed in an exploratory way. "Appetite" is, therefore, something that needs to be assessed at the front-end in making a decision to embark on a work-life balance initiative (whether that start is through a government agency or by an organisation independently).

2. Crowding out.

This is different to timing. Organisations have "busy" business as usual times (say with the renegotiation of collective agreements, annual personal performance appraisals, stocktakes, preparation of annual reports) and have to respond to unplanned disruptive events (working around a strike, dealing with a high profile media event or government initiated enquiry).

Even if an organisation is ready to address work-life balance issues, it can find that it doesn't have the time to apply dedicated resources to progressing them, and the project stalls. Restarting the project can be difficult because enthusiasm has waned in the meantime, and a degree of cynicism has set in.

3. Clash of cultures.

The persona of an organisation can change as new recruits with different expectations enter and this group grows in size and influence alongside the entrenched old guard. It can also change as expectations about process and performance are imposed on it through owner or management expectation or public pressure. These culture changes can cut both ways: the new culture can be a "rights based" one, and cramp a more relaxed existing tradition of flexibility and accommodation of personal needs; or it can be one requiring flexibility and responsiveness and clash with an established tradition of firm rules and fixed processes.

Work-life balance tends to work best if it is systemic and universal, but if expectations (of both different staff and different managers) diverge, the end result is not so much a patchy application of change as no change at all.

4. Top level buy-in.

There is no consistent practice with work-life balance projects: some are initiated with full endorsement from senior management and others are constructed through mid-level management and employees and “recommended” to the top level decision makers. There is no guarantee that just because top management has bought into the project at the outset there will be a seamless implementation, but where the route selected is to report to senior management, it seems much more likely that there will be delays, second-guessing of the implications for the organisation, a cautious response and a feeling of frustration and disempowerment within the project team.

5. Use of focus groups.

Survey results do produce “action lists” for any work-life balance project group to work off, but in these latest cases there was serious doubt cast on how self-contained they actually are. Well structured focus groups conducted by peers after careful preparation, and coaching by the consultants, at times set aside survey based priorities and typically were vital in sorting out priorities for attention. Solid focus group information gets to the heart of “what really matters”, and makes the project more relevant, even if at times it might generate some sensitive conclusions (especially where it is critical of management competencies and responsiveness).

6. Management training.

The first report did identify the importance of adequate briefing of managers who might have to implement new processes, and wrapped that up under a more generic heading of improving communications. In some of the later studies, however, it was identified that management attitudes can be a fairly rigid barrier, in turn generating a reaction that stops progress with more flexible and responsive practices.

The management training agenda needs to set more broadly, and applied and monitored more comprehensively (not just to the willing) if work-life balance is to extend beyond pockets within any organisation.

Organisational influences

There were clear differences in the detailed experiences of the four stage 2 organisations, in terms of process, impact, momentum and sustainability. However, these differences did not tend to arise out of differences in their structure or function: whether they were large or small, public or private sector, export orientated or selling in the domestic market.

Rather, the differences emerged from the pathways they selected, and the nature of the journeys they undertook: how early on they engaged senior management; how

directly they saw work-life balance as a part of the way work is organised; what methods they used to refine the issues that the staff surveys had identified; and what priority was attached to applying resources to follow up on working group recommendations.

Implications – generic resource

The success of any fresh work-life balance initiatives will be enhanced by paying attention to the lessons drawn from this Project. One of the objectives for the evaluation was to sift out best practice to assist in developing toolkits, to help develop customised solutions and to assist with a wider dissemination of resources.

These projects generated a number of positive outcomes and valuable lessons that can be incorporated into more generic resources and inform any future project design and management. These are spelt out in detail in the stage 1 report.

The key messages can be summarised as:

- Leadership and commitment from the “top” is critical – *key to pitching of resource material and project set-up.*
- If an external consultant is involved, scoping the workplace first to ensure the best fit and engagement will be more productive.
- Timing of initiatives (when enterprises are ready) and selection of appropriate projects will tend to lead to more lasting benefits – *a readiness checklist may be useful at the front-end.*
- Raising awareness in the workplace is close to being a sufficient condition for positive change – *resources can focus more on consciousness-raising and providing examples rather than prescriptive detail.*
- Process is important in improving structures and systems that enable greater work flexibility and in demonstrating respect for employees – *a process-oriented tool kit is a viable consequence of this project.*
- There is an important skill component to assisting people get on top of their work (communication, problem-solving, time management) and improving the quality of the work experience can have positive win-win spin-offs.
- Attention to communications is essential for knowing what entitlements are available and to adjusting workloads and patterns – *a basis for practical toolkit examples and suggestions.*
- A lot of little things make a noticeable difference – *organisations don't need to completely re-engineer!*
- Thoughtful use of rewards and recognition can be hugely motivating – *experience between enterprises can be shared through virtual and actual networks.*
- Predictability of hours is very important – *the key message is about demonstrating the value of showing courtesy and respect to staff as adults with responsibilities and lives to lead outside of work.*
- Training managers in both the potential benefits of work-life balance and how that might be achieved with changes in work organisation is a missing

ingredient - *a companion guide to line managers may be a useful additional resource.*

For example, EziBuy's Human Resources team put great effort into selling the benefits of the work-life balance process to managers. Such was the buy-in that initiatives were explored and implemented well before the project action plan was finalised.

It is worth noting that at this juncture in New Zealand work-life balance driven changes in work practices are more likely to be acceptable if they enhance business performance. Thus far, there has not been broad acceptance that there may need to be changes in the way business is conducted in order to improve work-life balance. This suggests there may be a second set of questions that need to be posed at some stage about how and in what circumstances work-life improvements may drive changes in business practices.

For example, one of the aims of Christchurch Casino in getting into the project was to reduce staff turnover. Turnover was 43 percent per annum, which is not high by the standards of the hotel industry, but was compared with Sky City. After the project it fell to 33 percent but has now drifted back up to 39 percent. There is no way of knowing if the fall and/or later rise in turnover was in any way impacted by the project, or what aspects of the project had any impact.

**STAGE 1 REPORT:
LESSONS FROM THE
WORKPLACE PROJECT**



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NOVEMBER 2007

Context and focus of this report

Work-Life Balance Programme

The Department of Labour conducted a broad public consultation on work-life balance in 2004 and found that employers were keen to address work-life balance issues in their workplace but needed practical tools and guidance to support them. The consultation also found that a range of workplace practices and cultures were barriers to work-life balance for individuals.

In response, the Department initiated a broad programme involving further research and policy work as well as an action research project aimed at testing research findings and developing contextualised know-how through interventions in a number of workplaces. This latter component of the programme was referred to as the "Workplace Project."

The "Workplace Project"

The Workplace Project (or the "Project") engaged 14 private and public sector workplaces (the selection process aimed to achieve a spread of size, public and private sector, industry type, location, union density and continuous operation (24 hour, 7 day)) in a five stage process that gathered baseline information relevant to work-life balance issues; identified priorities for addressing them; developed solutions in the form of an action plan; implemented them and evaluated their success. The participating organisations were assisted by specialist consultants paid for by the Department. A full list and brief description of participating organisations is in provided Appendix I.

The Project had three objectives, to:

1. provide practical assistance to the participating workplaces;
2. gather tools emerging from those workplaces, and refine them for wider dissemination; and
3. enable the Department to better understand "what works" to inform both future policy work and practice change.

The Project therefore had highly situation-specific objectives, a futures focus in applying the lessons more generically, and an action research dimension. It was based on:

- principles of active partnership and engagement of employers, employees and unions, and
- developing "win-win" solutions that benefited both employees and businesses.

While the Project used tripartite processes, it nevertheless stopped short of the boundary where a “rights based” imperative might pose statutory obligations on employers to meet various standards as a part of their wider public good obligations (like, say, in paying at least a minimum wage, meeting minimum holidays standards or making compulsory matching contributions to superannuation payments).

This is significant because the Employment Relations (Flexible Working Arrangements) Amendment Act 2007 has recently been passed and will place a more structured statutory obligation on employers to consider requests for more flexible working arrangements in defined circumstances. In that event, lessons from the workplace project could inform the design of materials and resources that might assist employers in meeting any obligations.

Selecting participants

In selecting participants in the Project, the Department sought to apply a number of criteria that were tightly targeted to provide assistance to employers to develop customised work-life balance tools. They therefore tried to get information on different kinds of working arrangements and to test solutions.

Specifically, in the private sector they looked for a range of employers that would:

- Exhibit, as a group, a range of working arrangements where it might be expected that a variety of work-life balance initiatives would be prevalent.
- Enable the project to examine working arrangements known to increase work-life conflict (shift work, inflexible work, 24/7 environments).
- Be somewhat typical of work arrangements and issues to avoid “one-off” or unique cases.
- Be in industries where there were skill shortages and or recruitment and retention issues.
- Reflect industry circumstances where there is some evidence that work-life balance solutions can improve working life (i.e. where non-monetary policies can improve working lives).
- Come from a range of locations and be of varying size.

In the public sector, there would be additional criteria that the selected agencies would:

- Span both policy and service delivery functions.
- Be of a range of agency sizes.
- Be selected to ensure that results are applicable across a range of agencies.

In the event, the project was not overwhelmed for choice, and effectively (albeit with a degree of selection through the organisations that were approached) had to work with those organisations that were willing to participate in the project. Despite this, by accident or design, the organisations that did participate were a reasonable fit with the criteria identified earlier.

The purpose of this evaluation

This report provides an evaluation of the experience of six of the participating organisations involved in the Workplace Project. These are: Christchurch Casino; City Care; the Education Review Office; EziBuy; Indeserve and Tip Top Bread. More detailed organisational demographics are provided in Appendix I. The six organisations were chosen by the Department on the basis that they were furthest along with implementation. The Department intends to evaluate the remaining organisations at a later date.

The evaluation was designed to examine three aspects of the Workplace Project insofar as it operated in the six organisations. These aspects were the:

- **process** used, including those parts of the process that were successful, intended and unintended outcomes of the process, and an assessment of what parts of the process might be improved or (with the benefit of hindsight) done differently;
- **impact** of the initiatives, against specific measures set by the organisation, or against expected outcomes, and on factors such as morale, productivity, communications, absenteeism, recruitment, staff turnover, hours worked and so on; and
- **sustainability** of work-life balance initiatives in workplaces over the longer term.

Because the Project had the objectives of gathering tools emerging from those workplaces, and refining them for wider dissemination, and of enabling the Department to better understand “what works” to inform both future policy work and practice change, we (the evaluation team) also sought to synthesise the lessons that emerged across workplaces.

This was not simply to produce “tools” for use in workplace specific circumstances, but also to develop insights that would inform process, timing, scope and content of future work-life balance initiatives, whether taken by government agencies, social partners or on the initiative of a key change agent within an organisation or workplace.

Evaluation methodology

The evaluation reconciled insights gained from a “top down” specification of what success would look like with those gained from “bottom up” interviews with various direct participants in the projects.

The success case impact model sought to reconstruct a picture of what success would look like by reading the Cabinet papers and officials’ briefing documents, by studying the contracts for the supply of services to participating organisations, by reviewing the file notes on meetings held to refine the project, and, significantly, by interviewing leading project sponsors and drivers, and participating consultants. This goes beyond listing objectives and specifies some anticipated outcomes.

We then compared what would be “nice to have delivered” with what existed on the ground after the intervention. This involved reading the consultants’ progress and final reports on each organisation, and conducting field interviews in each workplace. The purpose of the fieldwork was to get different perspectives so that we could “triangulate” them around what appeared to be generally shared assessments of what worked (and what didn’t), and to identify residual areas where perceptions diverged.

The triangulation exercise sought to interview a cross section of individuals (vertically in the organisational hierarchy, and horizontally across functions and departments). Typically we sought interviews with senior executives (ideally CEO, Operations Manager(s), Human Resources, mid-level supervisors or a mix of them); union delegates; (if the site was unionised); participants on the work-life balance working group(s), and a selection of employees who were not actively engaged in the project. Within the latter group, we tried include employees who had been in the organisation since before the project began (to get a “before and after” perspective and to see if it made a perceptible difference at the workplace), and some who had joined after it concluded (“what is it like to work here?”).

A key focus of the methodology was to identify what had been left behind: especially in relation to any momentum around on-going processes to improve work-life balance. Once the dynamics of change had been isolated, it would be possible to address the question of what conditions are required (and if they are absent, can they be created) to ensure that work-life balance issues are addressed over the longer term in each organisation.

Success case impact model

At the simple level, it could be assumed a priori that “success” would equate with meeting the formal project objectives outlined above. However, our investigations highlighted that there are different contextual values and imperatives that sit behind a set of objectives that a variety of parties can agree to. It is not what is being sought, but why it is being sought, because these differences in motivation can have material impact on how results are interpreted in relation to success. More fundamentally, the perspectives shape how the different stakeholders view what needs to happen next as policy is refined, tools and processes are developed, and new programmes are rolled out.

It may be over-simplifying, but for presentational purposes it is possible to isolate three perspectives on success, which at times coincide but at times diverge or at least sit in isolation. These are success from the perspective of:

1. refining policies and intervention instruments (toolkits etc);
2. the business (increasing productivity, reducing staff turnover etc); and
3. the individual (less stress, enhanced enjoyment of life, greater control over reconciling competing demands on time).

These perspectives (at least conceptually) generate a cubic matrix. The dimensions on each axis are outlined below.

Perspectives on “success”

The formal design of the project: the policy and programme perspective

From the formal record of engagement between the social partners, the policy objectives of the Workplace Project were to:

- provide best practice information and tools to workplaces;
- assist them to develop customised solutions;
- evaluate tools used; and
- prepare and disseminate a final toolkit.

In practice, there were some implicit objectives contained within the project design, briefings and terms of reference. These covered:

1. The *process* by which work-life balance programmes were to be developed and implemented (especially using partnership processes).
2. The *forms* of “balance” that should be targeted (these included hours and patterns of work, but also aspects of work intensity, what work is being done, how it is being done, and structures and support provided that helped achieve the balance).
3. The *dynamics* of programme development, implementation, monitoring and review (largely self-contained within enterprises and not reliant on continued support by externally supplied and funded consultants, facilitators or experts).

While this particular project was stand-alone, the Cabinet papers that authorised it envisaged that it would complement (and possibly support) other initiatives aimed at:

- skills development and responses to skill and labour shortages;
- workplace productivity initiatives;
- improved labour market participation for under-represented groups;
- enhanced employment opportunity; and
- increased labour market participation by women.

This latter broad policy perspective is extremely ambitious given the nature of the interventions resourced through the Workplace Project. The Project controlled few of the levers needed to achieve success and the indirect influences were likely to operate slowly and with some degrees of separation.

Internally, Departmental officials were less ambitious, *at least for this element of the wider work-life balance programme*. They saw the Workplace Project as an action research initiative to contextualise the wider policy work in a New Zealand setting. The evaluation design was therefore tailored to draw lessons from the process. Hence “success” from a participating firm’s perspective (“did we get value from the action plan”) need not align with Departmental needs (“did the pilots allow us to refine our policy”), if the value for the firm was localised and circumstance specific.

In this sense, it is important not to overstate the importance of the projects: they were only an action research project and not a comprehensive base for the preparation of a toolkit. This contrasts somewhat with what the consultants thought they were doing.

The business imperative

Business New Zealand is concerned with the proliferation of partially overlapping and largely disjointed structures addressing workplace issues, especially productivity, labour market flexibility and work-life balance.

The key for them is for the Project to stress and reinforce an integration of flexibility, productivity and work-life balance and to “de-brand” them as concepts in their own right. The main risk is that work-life balance is the one concept that can separate out: being seen as consistent with workplace flexibility, but disconnected from increased productivity. However, if flexibility is not tied in to the productivity agenda the work-life balance agenda will not be sustainable.

Business New Zealand accepts that in the first instance, “branding” work-life balance is probably needed to raise its profile and to focus attention on it, and was not opposed to the emphasis given to the brand in this exercise. However, the long-term objective of fusing it into the broader productivity agenda needs to be kept in mind. From this perspective, lifting productivity is the fundamental challenge for the New Zealand economy, and the work-life balance agenda can only be sustained if it contributes to meeting that challenge.

Given this emphasis, Business New Zealand sees it as important for the programme to deliver workable results in the private sector. It is also important to then locate initiatives that improve personal and family well-being in a context that raises productivity, specifically through:

1. team-based approaches, that avoid handing problems at work onto someone else; and
2. a recognition of the integrated and linked nature of production processes with the attendant requirement to avoid knock-on effects: delays, defects etc, which in turn complicate the quality of the work experience for others.

Productivity is the driver, but capital is not the answer (rosters etc are the key).

A successful project would identify opportunities from the pilots for quick and widespread dissemination. “Speed to value” should be a guide: releasing useful lessons for quick distribution through the Business New Zealand network. This is a strongly action-orientated perspective on success.

Business New Zealand has extensive reach and quick communications facilities, and prefers to be positive about promoting productivity messages as opposed to simply being reactive in resisting additional labour market regulation initiatives. This perspective implies that the “policy refinement” dimension of the matrix is dominated by the pragmatic application of the lessons dimension, especially in relation to productivity improvement. In this context there is a closer alignment with some of

the complementary initiatives envisaged in the Cabinet paper (responses to skill and labour shortages and Workplace Productivity initiatives).

Benefits to the individual

The mechanics of the project design - led by the Department, overseen by the social partners, implemented through bilateral contracts between the Department and participating organisations – meant that by definition, the perspectives of the individual employees were not “at the table” when the elements of success were envisaged.

A proxy for this perspective was therefore provided by the New Zealand Council of Trade Unions (NZCTU), but it must be accepted that the proxy is indirect. There are no unions (or low levels of union density) in some workplaces, and while NZCTU would have direct links to participating affiliate unions, the links in the chain – union, organiser, delegate, member – impact on how closely representative a NZCTU perspective is of the diversity of individual employee views of what “success” might look like. On the other hand, the tripartite and partnership processes envisaged for project mechanisms mean that the perspective of NZCTU is a valid picture of success in its own right.

The NZCTU considers that the terms of reference for the Project would have established a basic understanding of the roles of the different parties in the process of developing initiatives to improve work-life balance, at least at union organiser level if not at delegate level in the first instance.

In a success case, there would be a broader understanding among union linked participants (organisers, delegates) that they were not alone but were aware of what was happening on other worksites. Consultants would have been seen as neutral and not engaged by, or working on behalf of, employers. Sufficient resources would have been made available to sustain a wider view of progress with the pilots, beyond the specific work sites.

Work-life balance activities would develop in parallel with collective bargaining and industrial relations processes, not being either entirely separated from nor intimately part of them.

From a union responsibility angle there would be more consistency of organiser support for delegates involved in the projects.

From the Department and employer responsibility angle there would be a broad understanding and acceptance of the union as a positive force in such projects, including embedding the delegates’ role.

The projects would have been continuous and sustainable: successes would have become embedded, and if initiatives did not work other options would have been sought out. Initiatives should connect with a range of broader NZCTU objectives such

as quality of working life, workplace learning, increased productivity, a widening role for unions, building union capacity and increasing familiarity with the use of partnership processes. At a workplace level it is important to 'mainstream' work-life balance initiatives just as it is to integrate work-life balance into everyday union work. In this respect NZCTU and Business New Zealand perspectives converge: work-life balance is "de-branded", or at least integrated, although the obvious differences of scope of the wider agenda remain.

The programmes should have built support for work-life balance and avoided the development of cynicism. The provision of information and education on the experiences of the pilots would have spun out other initiatives in other workplaces without necessarily having to rely on formal structures and assistance from consultants. The initiatives undertaken should be sustainable beyond the life of the particular intervention/project. The evaluation should contribute to building sustainability. These perspectives align with the expectation of the Department that in an ongoing context these initiatives can stand alone and not rely on an externally funded consultant resource.

Employers involved would have become more aware of the value of the process and developed some improved ability to do something about it, including a greater willingness to invest in it to capture these returns. This partially aligns with the "speed to value", use of networks, and business return emphasis that Business New Zealand placed on the project.

Going forward, there would be sufficient resources and the provision of training to allow the process to spread and be sustained. This is partially consistent with the Cabinet paper view of alignment with complementary measures.

Reconciling perspectives

The variations in expectations about what the project could have been expected to achieve can be overstated: there is a substantial common cause around what "success" would look like. Six common themes emerged.

1. Work-life balance (and this project in particular) should not be seen as a self-contained policy objective. Rather, it is one element of a broader objective of improving the performance of workplaces by changing the way work is organised and done. There are differences about just how broad the "workplace agenda" ought to be and some differences about what elements and emphasis ought to be on that agenda, but it would be incorrect to evaluate the success or failure of the workplace project solely on the basis of its contribution to improved work-life balance.
2. A critical success factor for this project was whether (and the extent to which) it improved understandings among the participants of the sorts of instruments and interventions that work in the special circumstances and cultures of New Zealand workplaces.
3. It is important to maintain momentum and to introduce changes that are sustained and not episodic. If the project was seen as a fixed-life, discrete

- event in the history of the organisation, it would be seen as having been of limited success.
4. Changes in work organisation need to be – and to be seen to be – mutually beneficial for all workplace participants, with that mutual benefit flowing out of increased flexibility that enhanced productivity.
 5. Changes should be incremental and additive: a “big bang” shift in practice was seen as being neither achievable nor desirable, because it would have reflected limited ambition and imagination about what could be achieved over the longer term, and less likely to be sustainable.
 6. The project should have contributed to improved understandings (probably embodied in support resource materials) that would have allowed enterprises to manage the continuous change process largely from within their own organisations without excessive dependency on external “expert” advice and guidance.

Findings: scoring the success of the project

Set out below are the consolidated findings, insights and observations arising from the evaluation. Findings from each of the 6 individual organisations are set out in subsequent sections.

Self-assessment

The formal record of evaluations by participants in the project (feedback in meetings held by the Department, written reports) tends to accentuate the positives that were achieved. These include:

- commitment to the aims of the exercise;
- enhanced awareness of issues;
- persistence and perseverance;
- development of a strong database from which plans could be implemented;
- the achievement of a number of small additive changes; and
- building work-life balance into workplace cultures.

For example, at the EziBuy call centre there is a shift-swapping facility and a “leave early board”. Both are self-select flexibility arrangements. Shift swapping is seldom used: perhaps one or two a month. The leave early board is, on the other hand, actively used, perhaps by 10 – 15 people a day. If workflows reduce, staff can leave early in the order they have put their names up (even though they lose the pay they would otherwise have got). This suggests that short-term “real time” flexibilities can be just as important as those that are organised around predictable lifestyle commitments (sports training, after school care etc).

Issues that kept arising (and which may be seen to be sources of frustration and barriers to success) were:

- communications problems, with the workforce and with key partners, both before and during the process;
- identification and selection of key personnel (who would make the difference);

- continuity of participation;
- finding time for engagement beyond normal work duties; and
- confusion of roles and separation of work-life balance initiatives from formal bargaining over conditions of employment.

Factors identified that could be regarded as detracting from success were:

- implementation: producing a “plan” often being seen as the end point of the exercise; and
- the narrow focus of work-life balance practice on hours, shifts and leave, and not on the wider agenda of the content of work or the structure of workplace supports for better balance.

Qualifications to the self-assessment

Our fieldwork would add some qualifications to this self-assessment by key participants in the project.

- “Commitment” is patchy and potentially transient. The projects did tend to depend on a key sponsor or patron within each organisation, and progress usually needed to be “driven”. The process, as might be expected, was not a naturally occurring phenomenon. The Department’s trouble-shooting role and its wider perspective were seen as very valuable to individual workplace projects. This does raise some questions about the extent to which there is likely to be a broadly based and self-contained initiation of work-life balance investigations across the labour market or whether some external catalyst is necessary.
- Awareness of work-life balance issues was definitely enhanced in the workplaces that participated in the project. (Of course we have no way of knowing whether that enhanced awareness is more generic). One consequence, though, was that awareness was of work-life balance in its own right, which might detract from the conceptual preference for “de-branding” and incorporating it into a broader workplace agenda in a seamless way.
- The databases in each workplace reflected very different experiences with both the survey and the working group processes. These processes tended to reflect an implicit assumption of literacy and familiarity with survey type methodologies and with participation in working group activity. That was totally comfortable in (say) ERO and totally alien to (say) TipTop Bread. There was a general feeling that the survey was too complex, fell short of being fit-for-purpose and was more aligned with a research as opposed to an action agenda. [Note: the focus of the survey was hours, shifts and leave, and not on the wider agenda of the content of work or the structure of workplace supports for better balance].
- Small additive changes were the strongest feature of the responses. In fact, at times, some of the greatest successes did not even require change: they simply required clarification of what existing entitlements were. Knowing what employees can ask for and knowing why some requests for flexible work arrangements cannot be accommodated are hugely important. Establishing

- where the boundaries are contributes to certainty, which in and of itself is a substantial component of achieving “balance”.
- There is very little evidence that the projects achieved culture changes in workplaces. At times there were structural changes (such as appointing an Human Resources Manager at Indeserve, or introducing staggered start and finish times at EziBuy), and these changes became embedded in the operation of the organisations. They were permanent and directly attributable to the project, but fall short of reflecting a change in culture.
 - Communications within workplaces can always be improved, and it was difficult to judge whether communication breakdowns were specifically a problem with work-life balance procedures (or even with this particular project) as opposed to being more systemic in the organisation. Communications difficulties seemed to be particularly problematic with defining the role of a union in setting up the project, getting information out about the expected contribution from a union organiser, and involving unions in working group activities.

For example, Christchurch Casino convened a leave seminar for middle management to discuss options for better management of leave applications. This was a standout success, because it addressed a key issue, but even more importantly, because it highlighted how improved communications can lead to sharing of ideas across departments and reflect an ability to listen, learn and respond.

- Continuity of participation was a mixed bag. At times even churn at senior management level didn't seem to impact on the project in some organisations but in others it was fatal.
- Finding time for engagement beyond normal work duties is fundamentally a management responsibility. Participatory processes are only likely to work if they are on paid time, and this extends even to data gathering like filling out a survey questionnaire. If management does pay for participation, employees tend to put up with significant personal inconvenience to attend working group meetings and similar activities (the working group at Christchurch Casino is the exemplar).
- Role clarity is an ever present problem, and it might be that at the end of the day all parties need to accept that in the final analysis management has the ultimate authority to determine if any workplace practice changes are implemented. The inescapable fact is that work does involve resources and routines, and these are supplied or authorised by managers.
- The “plan” being the end of the project, and a narrow focus on hours of work are recurring themes that need to be addressed if the goals of dynamic and sustained change are to be achieved.
- In addition, there was significant concern about whether there are education resources and explanatory materials that are sufficient to underpin wider work-life balance activity, even if awareness and commitment is generated by the social partners. The question of who will “spread the message” remains unanswered.

Insights from the project

Any project is undertaken in an environment where other factors intrude, but because these factors may not remain constant, it is important to identify them and to comment briefly on their possible impact on the evaluation. There are also other insights that are inevitably gained during an evaluation, and these are recorded for completeness.

State of the labour market

The extremely tight labour market may have been a strong motivator in getting organisations “to the wire”. Retention of staff and reducing staff turnover were often cited as the main reason for improving work-life balance. While this can be a generic reason for improving the attractiveness of the workplace (to avoid the costs of staff churn and to capture the productivity benefits of deeper institutional learning), it is possible that it has a cyclical element.

We were not able to assess how enthusiastic and accommodating employers might be in the future if unemployment rises and jobs become less scarce.

Degree of readiness

Different organisations were in different states of readiness to engage with work-life balance issues. That was reflected in the amount of effort needed to get a project going and keeping it going, and in the degree of change that the organisation was prepared or able to implement as a result of it.

This means that the cost-effectiveness of any intervention is substantially impacted by awareness and receptiveness at the start, and suggests that if other interventions are contemplated, a threshold needs to be set as a precondition of participation.

Quantitative measures of performance

There were relatively few baseline quantitative performance measures extracted at the start of the exercise (i.e. in addition to the data on opinions coming out of the staff surveys) so it is difficult to evaluate the impact of the project in hard cost-benefit dollar terms.

However, when some indicators were used (overtime hours worked, staff turnover rates etc), they tended to show little change before and after the project, and/or were explained by other factors in the operating environment of the organisation. This is understandable: work-life balance is only a small part of the overall operation of any organisation; many of the benefits expected to flow from it are intangible (reduced stress, improved personal well-being) and changed outcomes would emerge slowly over a number of years.

All of this implies that while particular performance results might be desirable, it is not realistic to base an evaluation of the benefits of work-life balance on hard data

changes over short periods of time. This needs to be kept in mind in promoting participation in such projects to employers.

For example, EziBuy addressed unplanned overtime caused by late customers by having store managers go around shortly before closing time to tell remaining customers that the store will be closing soon and staggering start/finish times so that they had better coverage. There has been a reduction in unplanned overtime of 1,200 hours in the past year.

Value of the “free” resource

The resources provided to the participating organisations were often essential (they would not have got started without them, particularly the free consultant time), but in many cases because they didn't pay for the service they didn't “value” it. The input fitted in around the operational convenience of the organisations, scheduled activities were cancelled, consultants were at times used in more of a secretarial than an expert capacity, and so on.

The best results seemed to come in workplaces where the employers were prepared to make additional contributions thereby demonstrating their commitment. This does raise the issue of whether the provision of resources should be conditional on the organisations committing some additional resource (i.e. not just meeting time) to any project.

General observations

As noted above this evaluation covered six of the 14 organisations that participated in the Project, and there is a risk that it might not have captured all of the lessons that could have been extracted.

We do not think that this is likely because:

- The six organisations were extremely varied by size of organisation, sector (private/public), industry, geographical location, degree of unionisation, ownership structure and workforce characteristics (see table 2).
- While there were some major and many nuanced differences between the sites, our experience was that new insights and contradictions of earlier lessons were subject to diminishing returns, and we are confident that a more extensive evaluation would only have made a marginal difference to these conclusions.

Table 2: Characteristics of the organisations visited

Company	Size	Function	Region	Unionisation ²
Christchurch Casino	550	Entertainment/hospitality	Christchurch	10%
Tip Top Bread	220	Food processing	Auckland	100%
EziBuy	650	Call centre/ distribution	Palmerston North (mainly)	21%
Indeserve	120	Technical services	Wellington (mainly)	Nil
City Care	850	Utilities management	Christchurch	60%
Education Review Office	280	Public sector: education	National	90+%

Implications of different perceptions of “success”

As already noted, our conversations with stakeholders revealed some significant and some nuanced differences between them about what “success” would have looked like if the pilot projects had delivered on expectations.

This should be seen as a strength. It means that while it is unlikely that everyone will be happy with the outcome of the projects, it is likely that there will be enough in it for each participant/stakeholder to conclude that the project was worthwhile.

It also means that there are a sufficient number of distinct “motivators” to push on with work-life balance initiatives to create some confidence that if there was a push to spread uptake it is likely to resonate with different audiences for different reasons, with an overall effect of expanding uptake.

Going forward, there is probably value in an explicit recognition and, hopefully, reconciliation before the event, of different expectations, priorities and specification of roles, rights and responsibilities.

This is particularly important if the next stage involves the preparation of something akin to a toolkit or manual, because if that does not happen, there is a risk of several rounds of restructuring of any resource around sequencing, emphasis and even content, which would not be efficient from a process point of view (and can be fraught from a relationship management point of view!).

Reconciling expectations of success with the findings

Set out below is a table comparing the common themes about what high level project success would look like shared by the three main stakeholder groups, with the results of our fieldwork.

² Note that different estimates of union density will be derived depending on the proportion of the workforce regarded as the potential unionisation catchment. These figures are from Appendix I.

Table 3: What success looks like - common themes

Expectations	Result
Work-life balance should not be seen as a self-contained policy objective but as one element of a broader objective of improving the performance of workplaces by changing the way work is organised and done.	There is some value in separating out specific concepts/policies for particular attention especially in the early stages of their promulgation, to differentiate them from more generic programmes. Once more widely adopted it is easier to integrate such initiatives into broader based programmes.
A critical success factor for this project was whether it improved understanding among the participants of the sorts of instruments and interventions that work in the special circumstances and cultures of New Zealand workplaces.	<p>A number of relatively straight forward instruments and interventions were used which highlighted the importance of enabling greater flexibility in work arrangements and communicating them to staff as well as facilitating access to them, as a means of improving the overall work experience.</p> <p>The project also highlighted the value of simple processes of dialogue and discussion of workplace issues between managers, staff, and unions (where present) which can have utility as a way of working, beyond any particular project.</p>
It is important to maintain momentum and to introduce changes that are sustained and not episodic.	There were uneven outcomes with some projects adopting processes that will facilitate on-going attention to work-life balance issues (perhaps resulting in cultural change over time) and others adopting a project approach which is likely to result in more episodic change.
Changes in work organisation need to be – and to be seen to be – mutually beneficial.	Most projects have resulted in mutually beneficial change, even if it is relatively small scale. However, any change still seems to have to fit in with the employers requirements rather than be driven by employee need.
Changes should be incremental and additive.	For the most part agreed changes were incremental and additive. This works well and may help to reduce employer anxiety about such initiatives.
The project should have contributed to improved understandings that enable enterprises to manage the continuous change process largely from within their own organisations without excessive dependency on external “expert” advice and guidance.	There was considerable reliance on outside consultant support for both kick-starting and maintaining momentum although where an internal sponsor was identified, this has led to much higher likelihood of ongoing and internally driven change.

Lessons: building up a resource

One of the objectives of the Project was to sift out “best practice” to develop toolkits to use in workplaces, to help develop customised solutions and to assist with a wider dissemination of resources. The projects generated a number of positive outcomes that can be incorporated into more generic resources.

In practice, because of delays in concluding some of the projects, the Department commissioned a toolkit: “Making it work for your business: work life balance” (June 2007).

For completeness, we have carried out an exercise that looked at what lessons may have emerged for the preparation of resource guides if this evaluation had been used to inform a “blank sheet of paper” exercise. This is presented in Appendix II. We have also compared the lessons that we thought the evaluation identified with the content in the “Making it work...” toolkit. This is presented in Appendix III. Our assessment is that overall, the resource is **comprehensive**. There were no insights, tips, examples, process suggestions, warnings or checks that we came across that have not been covered in the material.

The toolkit is also careful to stress that any process needs to be aligned with the particular characteristics of the work being done, and the workers doing it (literacy, familiarity with formal structures for participation and decision making). It therefore avoids the trap of prescribing processes that will only be relevant within a particular segment of the labour market.

It’s a good resource.

Much of our comment, then, relates to **emphasis**. There are aspects of the resource that might have been given more prominence if the weight of our conclusions had been reflected in the resource. *This does not mean that we are right and they are wrong!*

It does imply that the resource should be left as is and used as is for the foreseeable future. The items of emphasis that we highlight can be kept as a reference source to see if practical experience with the use of the resource exposes the need for more assistance to be provided in bolstering some dimensions of work-life balance, or if other aspects are laboured.

Christchurch Casino

Christchurch Casino is a 24/7 (24 hours a day, 7 days a week) gaming establishment, and operates primarily through a mix of direct gaming room activities and hospitality (bars and restaurants). A number of ancillary services are required to support the core function (security, marketing, parking etc).

Issues identified

By management:

- Need to change the culture towards more trust and confidence
- Staff retention/reduction of turnover
- Improve morale.

By staff:

- Rosters (predictability, flexibility, frequency of changes)
- Leave (not being able to take it, short notice of confirmation)
- Communications (especially information on entitlements)
- Skills and attitudes of managers and supervisors.

Actions recommended for implementation

- Develop an agreed work-life balance policy
- Management training to encompass work-life balance issues
- Agree principles for managing leave
- Engage employee advisors on work-life balance matters.

Actions taken

- Substantially improved communications of entitlements and processes through Intranet, Kiosk, brochures
- "Principles for managing leave" agreed (stressing joint responsibilities and importance to both the individual and for casino operations)
- Leave seminar for supervisors held
- Committee to oversee ongoing work and implementation of improvements established.

City Care

City Care is a wholly owned subsidiary of Christchurch City Holdings and is involved in amenities management, mainly in Christchurch (650 staff) with a smaller presence (150 staff) across Auckland, Tauranga and New Plymouth. Operational divisions within City Care include buildings, grounds, water and waste water, roads, fleet amenity cleaning, management and technical services.

Issues identified

- Flexible working hours
- Working from home
- Organisation of work
- Shorter working week and/or year.

Actions recommended for implementation

- Ability to adjust working hours to reflect work flows and seasons according to the needs of each division (eg 40 hours work over four and a half-days)
- Managers having the ability to work from home
- Integrating these provisions into recruitment and employment packages (in a tight labour market)
- Assisting employees returning to work after parental or sick leave to re-engage with workforce and balance family commitments
- Reorganise work processes.

Actions taken

- Divisional managers have discretion to offer more flexible work arrangements (only two have acted on this)
- One division has significantly streamlined work processes to enable a strict finishing of work at 5pm each day with no work to be taken home
- The Parks and Reserves division is working longer hours in the summer and taking time off in winter months to reflect different work demands in different growing seasons.

Education Review Office

The Education Review Office (ERO) is a government agency charged with reviewing and reporting on the quality of education provided to children by schools, early childhood education services and others in the pre-tertiary sector. ERO has approximately 280 staff in five geographic areas with a Corporate Office in Wellington. There are two specialist units. Reviewers are required to travel to providers during term time and spend typically two to three nights away from home per review. An effective utilisation rate (hours spent on preparing for and conducting reviews) of 1,400 hours per year is expected of reviewers.

Issues identified

- Problems with scheduling reviews, causing longer hours being worked by some reviewers, extended periods of travel away from home, back to back reviews and the coordinating role falling on the same people
- Managers working excessive hours
- Difficulty in raising work-life balances issues with managers
- Inconsistent approaches to working from home requests
- Requirement to garage ERO cars at work requiring staff to give up personal time to collect them for reviews.

Actions recommended for implementation

- Review of scheduling, explore technological options
- Review work from home policy and practice
- Review car garaging issue and any obstacles to staff having cars at home (Fringe Benefit Tax etc).

Actions taken

- Working group review of all issues raised
- External consultant engaged to scope scheduling software. Not successful because of cost. Still being explored
- Increased individual awareness and input into scheduling
- Discussion has resulted in improved communication between managers, and staff feeling more empowered to raise issues with their manager
- Car policy changed
- Working from home policy rewritten and promulgated.

EziBuy

EziBuy is a privately-owned multi-channel retail company. The owners have remained actively involved in the company, which has grown from two staff in 1978 to 650 staff today. The organisation is predominantly comprised of female staff and the work is low paid (retail, contact centre and distribution workers).

Issues identified

- Inflexible shifts in call centre
- Distance from town, resulting difficulty attending to personal business in town
- Unpredictable finishing times in retail, resulting in unplanned overtime
- Extra demands in retail caused by peaks linked to catalogues coming out
- Work overload in design, support and finance areas
- Childcare, health and fitness not being manageable
- Inadequate awareness of basic entitlements.

Actions recommended for implementation

- Allow shift swapping
- Introduce time off rewards; work longer hours one day, and leave early another day
- Enhance customer awareness of closing time; research shift patterns
- Increase use of shop fillers and night fillers during busy times
- Record hours worked to assess workload; examine use of technology, work processes and communication; explore time management options
- Explore childcare and fitness centre options
- Raise awareness of entitlements.

Actions taken

- Shift swapping introduced, guidelines agreed, voluntary go home early board established
- Flexibility is provided where possible to allow employees to attend personal appointments, managers have been encouraged to take a flexible approach
- Proactive management of hours worked in newly opened distribution centre, increased awareness of measures to support stressed employees
- Monthly focus groups of staff convened, suggestions put forward to management
- Opening hours advertised, managers take responsibility for telling customers store will be closing
- Changes in shift patterns; meetings planned well in advance; limiting staff working all weekend
- Shop fillers and weekend staff employed during peak times
- Work overload identified, work processes reviewed to reduce overwork, additional staff employed as required

- Terms and conditions workshops held; managers updated on outcome of negotiations; human resources resource stands introduced; internal newsletters and intranet improved
- Childcare and health & fitness options researched, partner arrangements made, information on stands; wellness programme introduced.

Indeserve

Indeserve is a privately owned technical service company installing cables, telephone systems etc, testing electricity meters and similar activities. It has a nationwide presence (five locations), sustained in some centres through preferred contractor arrangements and employs a permanent staff of 100.

Issues identified

- Too much overtime
- Rostered on-call
- Need for more training with new technologies
- Need for sales training
- Stress in meeting customer satisfaction standards
- Perception of some unequal entitlements to sick and annual leave.

Actions recommended for implementation

- Engage specialist company to design job ads
- Develop Employee Wellness Programme
 - Flu vaccines
 - Revitalise social club
 - Fresh fruit
 - Leave bank
- Restart company-wide meetings
- Engage part-time human resources specialist.

Actions taken

- General comfort that the survey showed an 87% level of satisfaction with work-life balance
- Part-time human resources specialist engaged: now almost exclusively overseeing implementation of recommendations and driving progressive improvements
- Recommendations being implemented where practical and cost effective (eg social club, professional assistance with design of job ads)
- Codification and communication of policies, processes and entitlements improving general levels of satisfaction
- Personal development plans to enable more individual control of management of work-life balance being gradually extended
- Ideas from working group that have been tried before not being progressed (eg time bank).

Tip Top Bread

The project was undertaken in the Auckland bread-making operation of Allied Foods, which employs about 270, predominantly Samoan and Tongan and quite long-serving, employees. Nearly all production staff are members of the Baker Union. The Tip Top bread range accounts for about 25 percent of New Zealand's bread. With 12 bakeries, four milling sites and Purity Foods which makes Big Ben pies, Allied Foods is a big player in supplying the grocery trade. Allied Foods is owned by Australian company George Weston Foods (GWF).

Tip Top is a 363 days a year and 24 hours a day operation working fixed shifts.

Issues identified

- Shift work with some shifts working a lot of overtime (although in this organisation, paid overtime means long hours delivering more income)
- Poor communication between departments and between shifts
- Need for better work planning and processes to reduce errors and waste.

Actions recommended for implementation

- Flexible start and finish times
- Managers and supervisors being more understanding of individual needs
- Staff knowing they could leave work in the event of a family emergency.

Actions taken

No actions have been taken that are directly attributable to this project. However, wider GWF-level management changes and a cultural survey which confirmed the findings of the work-life balance survey, have led to a new and broader agenda for change that is getting underway. This includes some major reductions in working hours and the beginnings of a cultural change starting at management level.

Appendix I: Profile of participating organisations

Organisation	Sector	Location of project	Size	% Unionisation*
Christchurch Casino	Recreation, food services	Christchurch	550	10 (SFWU)
City Care	Local government, utilities	Christchurch (smaller presence in other centres)	850	60 (Five unions, main one AWUNZ)
Compac Sorting Equipment	Manufacturing and export	Auckland (with international offices)	120	10 (EPMU)
Department of Labour	Central government, policy advisory	Workplace Policy Wellington (other national international offices)	80	33 (PSA)
Express Couriers	Courier services	Courier Post Wellington (with offices nationwide)	150	50 (EPMU)
Fulton Hogan	Infrastructure construction and maintenance	Canterbury Region Christchurch (with offices nationwide)	480	75 (waged staff) (Internal union)
Hutt Valley District Health Board	Health	Hutt Valley	2,000	Multiple unions (11) Density levels highly varied by section: average misleading.
Kirkaldie and Stains	Retail	Wellington	300	15 (SFWU)
Ministry of Agriculture and Forestry	Central government, service providers	Quarantine Services Wellington (with nationwide operations)	800	90 (PSA)
NZ Police	Central government, services	Decentralised via 12 Districts	10,300	90 (Police Association)
Tip Top Bread	Food processing	Auckland	150	100 (Bakers Union)
Education Review Office	Central government, education	Nationwide	280	90+ (PSA)
EziBuy	Multi-channel retail	Palmerston North (with outlets in other centres and in Australia)	650	21 (EPMU)
Indeserve	Electrical and telecommunications services	Wellington (with some presence in other centres)	120	Nil

*Percent of staff. Union density measures can vary depending on assumptions about what part of the organisation are potential members. These figures are from the summary report prepared by the Department of Labour.

Appendix II: Implications for constructing resource toolkits

Project outcomes that can be used to develop a resource

These are summarised below:

- Leadership and commitment from “the top”, (which is essentially very close to the highest authority in the organisation) is critical, not just to permit changes, but to empower those working on work-life balance initiatives with the scope to explore the full range of options that might be available, and to dedicate the resource (and determine the priority!) to projects and their implementation. *[This does influence where at least some of any generic resource materials need to be pitched.]*
- Awareness is in and of itself close to being a sufficient condition for positive change. Awareness of the importance of work-life balance tends to focus the attention of relevant change agents (whether that is senior management, Human Resources or line/divisional managers) on opportunities for improvement, and that naturally flows into revised practices. Awareness of options to change patterns of work or hours of work generate “peace of mind” for employees, even if the options are not exercised very often. *[This is a particularly important finding from the point of view of building a resource: it can be consciousness raising in its focus and does not need to be prescriptive at a level of detail.]*
- *How* organisations go about doing things is as important as *what* they do in terms of demonstrating genuine commitment and thereby helping to overcome workforce cynicism about the “latest fad.” Process is very important in improving structures and systems to enable greater flexibility in working arrangements. “Best practice” manuals, or process guidelines can be developed for use when there is an interest in addressing work-life balance in particular situations. *[A process toolkit is a viable consequence of the project.]*
- Many processes and options for flexibility are informal and can be developed on a grace and favour basis. Codifying and documenting current practice is both comforting to the worker and empowering for both worker and immediate manager (“its okay to do that”). *[Again important in preparing resources: it isn't that difficult to make a difference: simple measures work!]*
- Ensuring people have the right skills (including personal skills such as communication skills, problem solving, time management) to get on top of the job they have is an important (and often neglected) part of improving the quality of the experience at work. *[This highlights a feature that is very positive from a business performance point of view and emphasises that work-life balance initiatives have positive spin-offs and are very strong in a win-win sense.]*
- Communication is raised everywhere as being central to both knowing what rights are available but also to interacting directly in changing and adjusting work loads and work patterns. Increasingly electronic forms of communication are the preferred medium, but not all workers have access to computers etc

- at convenient times and locations: expectations that they will connect with information systems from home computers or other private devices in their private time are unrealistic. (If work has to follow the worker home in order for the worker to access information about rights to flexible options there is something out of balance!) *[This creates a basis for some very practical suggestions to be made in any generic toolkit.]*
- A lot of little things make a noticeable difference, without changing the world. *[This gives comfort: organisations don't need to completely re-engineer to make a difference!]*
 - Recognition and rewards can be relatively inexpensive but hugely motivating and tend to have a big impact on the quality of the experience at work. Generally, these systems are underdeveloped, unevenly applied and awkwardly given and received! *[This is an area that can be worked up through a process for sharing experience on a type of bulletin board.]*
 - Predictability of hours is very important. Associated with this is the amount of notice that is given about shift patterns, overtime requirements etc because even if there is some flexibility of working hours built into various rosters, if there is inadequate notice it is not realistic to plan activities *outside* of work to take advantage of the flexibility. *[Another simple "courtesy and respect" lesson that doesn't need to overwhelm organisations.]*

Refining any messages or resource

There are a number of caveats that need to be attached to the core findings: these are not negatives, and should be seen as being in the nature of refinements that anticipate barriers and forewarn about them, and empower those responsible for implementing change to overcome them.

- Thus far, work-life balance tends to be seen as being a legitimate reason to change work practice if it is consistent with the existing business model and way of working, and especially if it enhances business performance ("good for the business"): There has not been any broader acceptance of an obligation to change the way the business works *in order* to improve work-life balance. This is probably an implicit reason for conclusions that work-life balance initiatives have not had dramatic disruptive effects. *[This is a positive in the sense that resources can be designed around an "it's good for business" message. It also suggests that there is 'second generation' set of questions that need to be posed at some stage about how and in what circumstances there is an expectation that the work-life balance tail might be expected to wag the business dog.]*
- There is some ambivalence at the policy and process advice level about whether work-life balance is about the quality of the experience *at* work, or facilitating more choice *away from* work. While the "talk" is all about the total experience, the "walk" tends to focus more on hours of work and options to vary them. *[This suggests that there is a need to re-emphasise the importance of the quality of the in-work experience in any manual or set of generic messages. A more pleasant working environment can do wonders in*

creating a greater sense of well-being thereby contributing to greater balance in the lives of workers.]

- Behavioural changes are hard to achieve, hard to identify and assess and very difficult to prescribe, but “how people behave at work” is a soft-wired but important dimension of a balanced work experience. *[Probably another ‘next generation’ issue to explore in refining work-life balance messages.]*
- Most projects seemed to take a long time and make relatively small changes: expectations had to be lowered after the event. It is perhaps better to start out with modest (but realistic) expectations and then to “stretch” if results surprise on the upside. The consequence of unrealistic expectations is demotivating, and can stall any prospect for continuous improvement. *[This is an important message to get out in any material, but it must be crafted with care. The risk is that it may be so de-motivating that the impression is left that if results are so modest, it may not be worth spending time and money on!]*
- Training of management in both potential benefits of work-life balance and in accepting new ways of organising work is a missing ingredient in the process to date. Managers in most organisations are “handed” options for change, not trained in how to assess or respond to them. The priority is to work first on those with the power to make changes. Managers were largely still reported to be working excessive hours. This affects their awareness of and responsiveness to workers’ needs for work-life balance. *[This will influence the tone and content of any resources, and can even suggest a stand-alone companion “guide to front line supervisors” resource.]*
- Continuity of management can be a factor in determining whether or not any momentum is maintained. The two cases in which management change has been most dramatic (City Care and Casino) show very different responses. In one case the project effectively terminated, but in the other the process “rode through” management turnover. This suggests that either it is necessary to document and embed changes in systems so that institutional knowledge is at least partially protected from extensive change at management level, or ongoing structures (like a working group) are needed to keep the purpose of the exercise alive. *[Documenting what was done, why it was done, and what the benefits of doing it are has to be a strong feature of any guide or manual.]*
- It is not always easy to pick when the time is right to try something “different” in order to improve work-life balance, but initiatives that have been taken when the time *was* right have tended to have had a more lasting impact. Tip Top Bread was a perfect example of this: the project languished until there was a change in senior management who initiated an unrelated culture survey across the broader group that identified an organisational crisis. The jolt this produced in senior management resulted in all of the identified work-life balance initiatives (almost coincidentally) being pursued with genuine passion. Operationally, this could be applied in the converse: not trying to force the pace of work-life balance when conditions are not receptive to it (low awareness, organisation under pressure from other features of its

- operating environment etc). *[A checklist: "are you ready for this" might focus the decision to start an initiative, but again care must be taken in crafting the guide, because it is too easy to find reasons **not** to start. So perhaps it should be "What you need to do/have in order to be ready for this".]*
- Cynicism is a constant threat to work-life balance changes. Managers can be cynical about the benefits or suspicious about "fads", and workers can be cynical about how receptive management is ("If it works for them they will change; otherwise it's a waste of time trying"). This suggests a mix of setting realistic expectations at the outset, and recognising and reinforcing gains that do come out of projects. They can easily be invisible, or attributed to other processes. *[Any guide should have constant 'positive reinforcement' triggers, and will be more effective if successes are recognised, documented and celebrated.]*
 - Stocktakes (surveys with a more general scope, or even customised work-life balance surveys) need to be carried out at regular intervals if they are to capture their full benefits (to check on progress and identify changing issues). They need to be designed fit for purpose, consistent over time, and not augmented around "nice to know" questions or they will produce superfluous or confusing data and lower than achievable response rates. Assistance with responding needs to be customised to the specific circumstances of the workplace (levels of literacy, familiarity with form filling, having time at work away from front line tasks to complete the survey etc). *[This can be worked into any process guideline.]* Surveys should go beyond hours/shifts to include questions to do with the quality of the work experience and work organisation, if that's what work-life balance is about.
 - There is a constant tension between hours of work and money. Often, good hours are long hours, especially if overtime rates are payable. In an extreme case, cutting back hours led to workers taking secondary jobs, which actually made work-life balance *worse* (more travelling time for the same paid hours etc). *[It is important not to be judgemental about what hours individuals **should** work. Materials should stress that individuals and families will work out the trade-off they need to make around hours and money, but that within any given set of decisions about what sort of hours need to be worked, work-life balance should still be optimised.]*
 - One matter that was out of scope for the project was reverse imbalance: whether a stressful or unsatisfactory home life was contributing to problems and a lack of satisfaction at work. This tends to be left to be picked up by Employee Assistance Programme facilities or direct counselling, but perhaps could be seen as a part of a work-life balance package if a holistic approach is to be taken. *[This is a delicate area, but from other projects we have been involved in, experience is that what might appear to be patronising and intrusive was actually welcomed by the employees with personal problems. This is an area where a joint approach from EAP specialists and work-life balance programmes can find the right balance, tone and form of communication on the sort of assistance that is available.]*

- Thus far, conditions of employment have been seen to be outside of work-life balance scope, but a number of adjustments to working arrangements and rights to align work with out-of-work interests and obligations will not be possible without some (mutually agreed) changes to contractual rights and responsibilities. *[This might change if the legislation creating an obligation to consider requests for flexibility goes through. At the moment, there is not much that can be done without interfering in the bargaining process, other than a gentle reminder to think about work-life balance when determining employment conditions. Employers in particular seem to want to shelve work-life balance programmes during collective bargaining, but unions also need to be sensitised to risks that bargaining tactics are seen as being opportunistic (using work-life balance as a lever). This is an area that can be pursued in a tripartite context, and is not readily incorporated into generic materials.]*

Some cautions

These comments are not meant to be negative, but are put forward in the context of “no surprises”, or “eyes wide open” for all main stakeholders.

- Flexibility is not always a positive sum game: in many cases the flexibility required by one worker has to be covered by another worker. Outside of voluntary bi-lateral swaps, this can involve the use of contractors and casual workers, who then carry the risks of unpredictable and volatile hours and patterns of work in order to facilitate flexibility within the directly employed core. There is not any real investigation of, or clarity around, whether this is entirely suitable (such as for students) or whether work-life balance is being compromised elsewhere in the labour market. *[This raises a policy question, and is not directly related to the preparation of any resource that might have come out of the pilot projects. It may be entirely legitimate to work on the 80/20 rule, but that decision should be made consciously, not by oversight.]*
- It is possible for these “transfers” whereby flexibility for some is achieved by requiring other workers to provide the cover to take place *within* the workforce through the process of recruitment: new employees are told that these *are* the hours and because they knew what they were taking on when they signed on they are not expected to then complain. This does assume that the choice was entirely voluntary when either there were other considerations which compensated for less than satisfactory hours, or the circumstances of the new recruit may change (shifting residence, having children etc.) *[This is a variation on the policy theme, but it can influence the content of any resources through a “make sure you do not create a two-tier workforce” type of warning.]*
- Social partners (Business New Zealand, New Zealand Council of Trade Unions, and Department of Labour) are likely to be “patrons” or “sponsors” of work-life balance, not active participants in real time programmes. This is because initiatives are highly workplace specific and key person dependent. It is far too resource intensive to be core business for union organisers, and active and continuous engagement is rare. Changes ultimately depend on authorisation from the appropriate managerial authority, and are therefore

almost exclusively “steered” by the specific way work is organised in the individual business. These are some degrees separate from the spheres of influence of institutionalised industrial relations. *[There is no need for central organisations to go beyond sponsorship, ginger activity, exhortation, provision of information etc. However, it is important to be relaxed about the limitations of a potential role in a workplace process.]*

- Work-life balance is not a concept whose time has come in terms of being at a “tipping point.” Unlike, say, workplace health and safety, where there is widespread awareness, embedded structures and processes and high levels of awareness, the concept is somewhat “fuzzy”, responses are scattered rather than universal, focus is episodic rather than continuous, and benefits are seen to be marginal rather than fundamental. *[This conclusion reinforces the importance of more continuous awareness or consciousness- raising as activities that a variety of leadership organisations can take. It might alter if there is legislative change. If that does happen, it is important to both be alert to the opportunities and to use them in a constructive way and not convey an impression that certain actions must be undertaken by unwilling conscripts.]*

Appendix III: Evaluation of toolkit

A comment on the Department of Labour toolkit: "Making it work for your business – Work-Life balance"

This comment on the toolkit is provided from the perspective of the insights gained from our consultations with key stakeholders, and the evaluation of the six Workplace Project sites.

It is difficult to criticise any resource like this on the grounds of structure, sequence, tone and style: any other authors would have an idiosyncratic way of approaching the resource and the resulting product could just as easily be criticised for a difference of approach.

We have therefore taken these basic design features as a given.

Overview

Overall, the resource is **comprehensive**. There were no insights, tips, examples, process suggestions, warnings or checks that we came across that have not be covered in the material.

The toolkit is also careful to stress that any process needs to be aligned with the particular characteristics of the work being done, and the workers doing it (literacy, familiarity with formal structures for participation and decision making). It therefore avoids the trap of prescribing processes that will only be relevant within a particular segment of the labour market.

The template survey questionnaire is shorter and more manageable (from the perspectives of both filling it out and of processing it) than was the survey used in the Workplace Project, and this anticipates and responds to the feedback that we got that the original survey was too complex, particularly for some workplaces.

This is a toolkit for "your business", and so the immediate target is the organisation that is capable of supplying the resources to carry out a work-life balance project, and that has the authority to make the changes that may come out of one. It therefore avoids the role and authority confusion that can arise if there is a suggestion that *particular* projects need to have tripartite partnership sponsorship and oversight. (Even if the wider labour market initiative does). It does this whilst retaining the necessary reminders to involve the relevant union and workplace representatives where appropriate.

It's a good resource.

Questions of emphasis

Much of our comment, then, relates to **emphasis**. There are aspects of the resource that might have been given more prominence if the weight of our conclusions had

been reflected in the resource. *This does not mean that we are right and they are wrong!*

It does imply that the resource should be left as is and used as is for the foreseeable future. The items of emphasis that we highlight can be kept as a reference source to see if practical experience with the use of the resource exposes the need for more assistance to be provided in bolstering some dimensions of work-life balance, or if other aspects are laboured.

There are four areas where our experience would suggest more emphasis might be needed.

Responsibility of the individual

The toolkit notes that “deciding on and maintaining an appropriate balance between our work life and our personal life is an individual responsibility.”

This is totally correct, but apart from that mention, most of the specific actions outlined in the processes tend to focus on what the *organisation* has to do to promote work-life balance.

Reinforcing both the responsibility of the individual, and the capacity of the individual to take charge (‘it’s okay to ask’) needs to be woven through the outcomes of work-life balance processes in a more emphatic and explicit way.

In addition, there are some skills that the individual may need in order to assume personal responsibility (such as time management skills, assertiveness training etc) that can be provided through the workplace.

Predictability of work patterns

The importance of predictability of:

- finish times (even more than start times, because pick up and other responsibilities are more prone to disruption if the end of the work span is uncertain);
- rights to attend to urgent off work calls (sick child etc);
- ability to schedule personal appointments within standard access hours (dentist, doctor, consultations with lawyers, teachers etc);
- the way annual leave applications will be processed;

rank alongside flexibility in hours in creating either peace of mind, or improved planning to deal with out of work responsibilities. For example if it is certain that some releases will not be granted, arrangements can be made for other family members to respond to these appointments.

This is covered in the material, but is not given the same prominence as flexibility as the answer to work-life-balance issues. Where operational imperatives restrict flexible work arrangements, it is important not to brand the workplace as “unfriendly”, but to steer the process towards redefining and clarifying where the

boundaries are, and explaining why they need to be there. This is in itself often sufficient to dispel a sense of grievance and tension.

Shifting the problem

The resource does talk about all workers having some reason for wanting to pursue out-of-work interests, but there is always a risk that some flexibilities are only used by those who qualify for them in line with existing criteria (sick child, school holidays etc.) This can then mean that the burden of providing the cover is not absorbed by the employer, but shifted on to other employees.

Our experience from other studies is that there is a strong culture in New Zealand workplaces of 'cover and resent', without complaining, which can be debilitating for the individual and for workplace morale in general. This is most pronounced with regard to tolerating and covering for poor performance, (and then resenting that poor performance), but organisations need to be sensitised to the fact that more flexibility for some can, unless other things happen, translate into less flexibility for others.

Those warnings are there in the toolkit. Experience with its application will establish if they need to be highlighted, repeated, and accompanied by some tips on how to ensure that unintended side-effects are avoided.

The quality of the in-work experience

The toolkit does identify that job satisfaction and a feeling that the work being done is valued is a central element of work-life "balance". However, it is fairly light in emphasising that throughout the processes that are recommended.

There is a much stronger emphasis on "dividing" time and energy "between paid work and all the other things they need and want to do" than in improving the quality of life at work.

This is not the place to detail how the in-work experience might be improved, but examples are assistance with personal skills such as time management; regular internal communications on the state of the business (to offset rumours of redundancy etc.); periodic group celebrations when performance targets are met; and strong personal feedback to enable the individual to both receive praise and (if necessary) seek to improve personal performance. (New Zealand workers are notoriously bad at giving and sometimes receiving praise!).

This might be an area for the "next generation" of work-life balance resource development.

Comments on process

There were two process issues that might similarly be considered afresh in the light of experiences with the use of the toolkit.

Organisational structure: Who is “you”?

The process guides tend to talk in the abstract about what “you” need to do at each step, with some fungibility around just who the “you’ is that is doing things at different stages.

The risk is that actions fall between the cracks because responsibilities for particular actions are not assigned or clearly allocated. We can see the rationale for leaving organisational design issues to the separate bodies that are seeking to improve work-life balance, because any set prescription is unlikely to be universally fit-for-purpose.

If this does prove to be problematic, some guidelines about how to pull a structure together can be lifted out of the Partnership Resource Centre’s “Workplace Partnerships Diagnostic Toolkit” (see Appendix I of that toolkit).

Distribution channels

It is not clear how this toolkit finds its way into workplaces. If it is left to individuals to become both motivated to do something, and then sufficiently informed to locate the toolkit, penetration and use might grow slowly.

During our consultations with stakeholders, Business New Zealand stressed the importance of the concept of “speed to value” (getting the value out of a resource as soon as possible), and suggested that its own distribution and communication networks could be used to good effect.

If this is seen as a valuable dissemination/distribution channel, the packaging of the toolkit might need to be revised. This is because Business New Zealand sees value in “de-branding” “work-life balance” and promoting it as but one element of the measures needed to boost productivity.

That, though, is a bilateral matter for the Department and Business New Zealand.

**STAGE 2 REPORT:
EXTENDED LESSONS FROM
THE WORKPLACE PROJECT**



STAGE 2 REPORT: EXTENDED LESSONS FROM THE WORKPLACE PROJECT

JUNE 2007

Extending the lessons learned

Without in any way seeking to detract from the organisation specific experiences that are documented later in this report, we think that there are six observations that were not quite as clearly expressed in the first report as was evident in this last round of site visits.

In summary:

1. Timing is everything.

It is very difficult to create and sustain momentum on work-life balance if the organisation is not ready for it. This applies particularly to management, because ultimately managers are those with the authority to make changes, but equally if the staff are not sufficiently concerned or motivated to change, a work-life balance project can be seen as going through the motions. The accompanying apathy applies a dead hand to the concept and makes it more likely that it will move down the list of priorities for action.

The implications of this are awkward. It is difficult, before the event, to know if the time is right, and resources can be wasted (or generate limited results) if deployed in an exploratory way. "Appetite" is, therefore, something that needs to be assessed at the front end in making a decision to embark on a work-life balance initiative (whether that start is through a government agency or by an organisation independently).

2. Crowding out.

This is different to timing. Organisations have "busy" business as usual times (say with the renegotiation of collective agreements, annual personal performance appraisals, stock takes, preparation of annual reports) and have to respond to unplanned disruptive events (working around a strike, dealing with a high profile media event or government initiated enquiry).

Even if an organisation is ready to address work-life balance issues, it can find that it doesn't have the time to apply dedicated resources to progressing them, and the project stalls. Restarting the project can be difficult because enthusiasm has waned in the meantime, and a degree of cynicism has set in.

3. Clash of cultures.

The persona of an organisation can change as new recruits with different expectations enter and this group grows in size and influence alongside the

entrenched old guard. It can also change as expectations about process and performance are imposed on it through owner or management expectation or public pressure. These culture changes can cut both ways: the new culture can be a "rights based" one, and cramp a more relaxed existing tradition of flexibility and accommodation of personal needs; or it can be one requiring flexibility and responsiveness and clash with an established tradition of firm rules and fixed processes.

Work-life balance tends to work best if it is systemic and universal, but if expectations (of both different staff and different managers) diverge, the end result is not so much a patchy application of change as no change at all.

4. Top level buy-in.

There is no consistent practice with work-life balance projects: some are initiated with full endorsement from senior management and others are constructed through mid-level management and employees and "recommended" to the top level decision makers. There is no guarantee that just because top management has bought into the project at the outset there will be a seamless implementation (crowding out, culture clashes etc.), but where the route selected is to report to senior management, it seems much more likely that there will be delays, second-guessing of the implications for the organisation, a cautious response and a feeling of frustration and disempowerment within the project team.

5. Use of focus groups.

Survey results do produce "action lists" for any work-life balance project group to work off, but in these latest cases there was serious doubt cast on how self-contained they actually are. Well-structured focus groups, conducted by peers after careful preparation and coaching by the consultant at times set aside survey based priorities, and typically were vital in sorting out priorities for attention.

Solid focus group information gets to the heart of "what really matters", and makes the project more relevant, even if at times it might generate some sensitive conclusions (especially where it is critical of management competencies and responsiveness).

6. Management training.

The first report did identify the importance of adequate briefing of managers who might have to implement new processes, and wrapped that up under a more generic heading of improving communications. In some of the later studies, however, it was identified that management attitudes can be a fairly rigid barrier, in turn generating a reaction that stops progress with more flexible and responsive practices.

The management training agenda needs to be set more broadly, and applied and monitored more comprehensively (not just to the willing) if work-life balance is to extend beyond pockets within any organisation.

Key findings: organisational influences

There were clear differences in the detailed experiences of the four organisations, in terms of process, impact, momentum and sustainability. These are outlined in more detail in the sections that follow. However, these differences did not tend to arise out of differences in their structure or function: whether they were large or small, public or private sector, export orientated or selling in the domestic market.

Rather, the differences emerged from the pathways they selected, and the nature of the journeys they undertook: how early on they engaged senior management; how directly they saw work-life balance as a part of the way work is organised; what methods they used to refine the issues that the staff surveys had identified; and what priority was attached to applying resources to follow up on working group recommendations.

These differences in the experiences on the journey are detailed in the case studies that follow. We conclude this supplementary report by telling a few “stories” in the final chapter to make the general observations specific and human.

Compac

Compac is a medium sized (130 NZ employees) privately owned company which designs and manufactures electronic sorting equipment for horticultural packing sheds. The company has grown in a fairly unstructured way, and has a flexible, laid-back culture. Design and head office functions (including training) are run out of Auckland. There are several offshore manufacturing plants. Production is partly seasonal, and involves tailoring components for each order that comes in. Employees range from semi-skilled (factory floor and stores) to highly qualified (design, IT and technical PhDs). Some employees have to undertake a great deal of travel (which can include extended periods offshore) to install and service plant for offshore customers.

Compac became involved in the project after an approach from the Employer and Manufacturers Association, and had three broad goals: improve morale generally; reduce burnout and turnover in areas that require a lot of travel; make it easier to attract staff.

Issues identified

The project team identified three priority issues:

- Reinforcing and extending flexibility
- Clarifying and addressing some of the travel provisions
- Developing a more active social culture.

Actions recommended for implementation

- Provide feedback to management team as to how important flexibility is to staff
- Provide managers with information on managing flexibility
- Trial staggered start and finish times in fabrication
- Write up clarification of travel allowances and lieu days
- Inform managers about travel arrangements, and managers to meet with their teams
- Investigate recompense for time spent in international travel
- Investigate streamlining planning to improve notice for travel overseas
- Upgrade lunchrooms and courtyard
- Establish and run a workplace forum
- Repeat discussions with staff to gauge reactions and impact of initiatives
- Use best places to work survey as an indicator of impacts.

Actions taken

The forum had a false start when there were no agenda items put forward for the first meeting, and an occasion to try to have another meeting has not arisen. Discussions about travel have tended to be folded into the renegotiation of individual employment agreements. The upgrading of the lunchroom and courtyard await an allocation of resources. Overall, then, the plan was not implemented as envisaged.

Hutt Valley Health

Hutt Valley Health is a secondary hospital with some tertiary specialties (plastic surgery etc). This means that in general, it has more predictability in scheduling its functional activities than, say, Wellington Hospital. However, the consensus view is that in addition to that functional/operational difference, the culture at HVH is more amenable to a responsive and supportive approach to staff wellbeing. "There is a family atmosphere; people want to be there...It's a good place to work...It always has been because it's a part of the community...It is smaller and better managed. It's a friendly and accommodating place to work..." etc. The project therefore worked off a solid platform to start with, and its main impacts were to:

- raise the profile of work-life balance as a workplace issue
- stimulate thinking and alert the participants to different ways of doing things
- set up a process for setting and agreeing priorities on what needed to be addresses
- galvanise people into action.

Issues identified

The main actions identified were those that impacted on work organisation within the workplace, with a very strong emphasis on reducing or managing sources of workplace stress. These included backfilling to cover short-term absences, debriefing following critical incidents, more effective communication, encouragement of teamwork, streamlining low-level problem solving responses to emerging issues, and improving the leadership skills of front line managers.

Actions recommended for implementation

The actions to improve communications were a mix of training and opportunities for more structured dialogue, supported by customised prompts to keep the communication flowing. Better leave planning would not only improve certainty for staff, but would also make the need for backfilling more predictable and more manageable. Teamwork and a more proactive response to emerging problems was to be encouraged through information gathering and through training, under the oversight of the working group which would continue to meet as required. The debriefing process, and resources allocated to it, was to be reassessed.

Actions taken

Action was interrupted as a consequence of loss of key personnel, competing demands from a range of projects and pilots that involved similar issues and similar people, and operational disruptions of various sorts. The working group did meet to revisit the recommended actions and to re-prioritise them, and many of the oversight activities have merged into the bi-partite systems that were established as a result of the most recent collective agreement. Overall, though, the project entered something of a hiatus, and rejuvenation now requires a refocus of attention and the allocation of adequate resource to ensure progress.

Kirkcaldie and Stains

Kirkcaldie and Stains is a traditional (120 year old) department store, with a reputation for high value merchandise and a brand based on formality and service, eg it has a concierge at the door and a pianist in store during lunchtimes, and there is an extensive use of honorifics - "Mr x", "Mrs y" in conversations that take place in a business context. This is presented in a formal Code of Conduct, and standards on dress and personal grooming. It is, though, a seven day operation, and has built a business model on high profile, almost iconic sales ("The Kirks Sale") that are "events" in some circles in Wellington society. The combination of weekend work and seasonal peaks around Christmas and the sales create a need to augment staffing levels beyond those associated with the standard working week.

Issues identified

There were three main issues identified for attention: making sure that staff had easy access to information about options they had to improve work-life balance; making sure that managers had the capacity to work with their staff to facilitate that balance; and ensuring that processes – especially with regard to planning and taking annual leave – were transparent, efficient, and seen to be fair. Kirkcaldies had a pre-existing sensitivity to improving work-life balance, and the common theme that ran through the issues identified was enabling, empowerment and facilitation.

Actions recommended for implementation

The actions recommended were reasonable systematic and structural responses to each issue. Awareness was to be improved by using Employee Advisors more effectively, by preparing pamphlets on specific aspects of work-life balance processes like taking parental leave or requesting changes in hours of work, through an enhanced employee induction programme and by working the issue into all standard booklets, policies and staff meetings. Manager capability was to be improved by making policies, guidelines and rules more explicit, and by rebalancing the content of management training. Leave processes were similarly to be regularised and published.

Actions taken

Implementation was relatively low key and many of the formal and more structured solutions have not been progressed. Examples are the low visibility of the Employee Advisor position and the issue specific pamphlets. Instead, a lot of the responses envisaged have been incorporated into a user-friendly plain English version of the individual employment agreement, and worked into a very comprehensive staff induction process.

Action has been stopped and started again as operational imperatives have distracted attention (stocktaking, new point of sale technology etc), but it is largely organic, and does progress (such as the roll-out of annual leave planning wall charts).

New Zealand Police

New Zealand Police is a national, 24/7 operation with over 10,000 employees. Although the roles between sworn and non-sworn are moving closer there is still a perceived distinction between the two; sworn seen as operational and non-sworn as administrative. Policing operations are decentralised over 12 districts, service centres and national headquarters. Police undertook the project across the whole organisation.

The project was overseen by a representative (by district and function) working group. It involved a very extensive consultation process, with focus groups providing invaluable insights. In particular, they highlighted how vital supervisors were in implementing any work-life balance improvements; drew attention to the levels of stress that were being encountered in the organisation, and underlined a high degree of variation across the different districts.

Issues identified

While the objective specification of the issues Police staff faced related to stress on the job, the project focussed more on the underlying contributors to that stress, such as how key supervisors were acting in noticing and responding to emerging stress indicators, and the very large variations of practice encountered across the country.

Actions recommended for implementation

The actions recommended all flowed out of a “principles based approach” because it was recognised that it would be impossible to prescribe set process and to outline expected results across the 12 largely (for operational reasons) autonomous districts. Those principles were anchored in the need for more effective leadership, better training, and closer attention to rostering and leave arrangements.

It was recognised that what was ultimately required was a continuous change in the culture (especially of management), and that in turn depended on genuine buy-in from senior management. A “Statement of Commitment” was seen as the starting point to getting that buy-in.

Actions taken

Implementation was slow because senior management had not been “on the journey” throughout, and took a cautious approach in evaluating the full resource and operational implications of committing to the full action agenda. However, an Organisational Health Audit that was carried out independent of the project but coincident with the consideration of its recommendations, both concerned management and validated the core findings from the project as to the underlying cause of workforce stress.

Sharing of experiences with good practice is envisaged as the best way of rolling out improvements across the country and contributing a more gradual improvement in both awareness of, and response to, work-life balance issues.

Stories

"In your own time"

Compac produces specialised fruit sorting and grading equipment, which is customised and fabricated "to order", and not on a traditional production line. Employees work four, ten hour shifts a week, but the workshop stays open for two hours beyond the "standard" shift hours so that (voluntary) overtime can be worked if and when needed. It can also use the Friday to catch up with peak work flows. This creates opportunities to adjust the actual hours of work to fit in with the lifestyle needs of employees.

In one case, an older employee with good skills and direct knowledge of the technology didn't want to keep working 40 hours a week, but did want to keep active and was a valuable resource to the company. He can work 7.30am to 1.00pm and it suits both parties.

In another, an employee became concerned about the peace of mind of his children in the wake of a series of high-profile violent incidents in Manurewa. He didn't want them to go home from school and wait for him to return from work. His manager let him leave the job and pick them up from school, and they waited in the staff cafeteria until he completed his daily hours of work, which he could do by working past the formal shift finish time to cover for the absence during the pick up. All parties accept that this is not a long-term solution, but as an interim stop gap it gives peace of mind.

In a third case, an employee has a partner who travels away from home periodically in the course of her work. When she is away, he starts late and finishes early so that he can drop the children off at school and pick them up. He makes up for the reduced hours either by working on the (nominally unworked) Friday, or by extending his hours when his partner is not travelling.

Part of job

There is always a risk that when special arrangements are made for one employee to fit in with their out-of-work obligations, co-workers can resent what they may see as special treatment, and feel that they have to cover for the anti-social hours and/or more stressful job content that is being redistributed among the workforce.

In the Police, there was an explicit provision for officers to exercise an "FEO" (a flexible employment option) when they had family responsibilities. In the past, this involved taking them off their standard front-line duties, and "finding" work for them to do, and the FEO got a bad name. It was probably counter-productive, because out of collegial loyalty, some staff who really should have exercised the option were reluctant to do so in case they were seen as "taking advantage" of their colleagues!

It is harder to do, but increasingly the emphasis is now going on improving the

responsiveness to family obligations *within* the existing position held by the officer concerned. This meets the need without putting pressure on either the person seeking the flexible option, or on colleagues to cover for the absence when there has been a secondment to a specially created position so that the FEO can be exercised.

Recovery from stressful incidents

An important contributor to enjoyment of life away from work is the ability to “leave the job behind” at the end of the day. This becomes critical at some times of the day when, for example, an employee may finish a shift late at night and then needs to drive home, when a stressed condition increases the direct risk of harm.

Hospital staff encounter “critical incidents” from time to time, when a patient becomes difficult, or the family of a patient become agitated or distressed, perhaps after continued poor health or even in the event of a death. “Debriefing” after such incidents helps impacted employees to talk through the incident in a comforting and supportive way. The process is meant to be non-judgemental and distinct from any personal appraisal mechanism and/or disciplinary procedures which are conducted through other formal policies and procedures.

The work-life balance project at Hutt Valley Health identified the debriefing process as a high priority action item for a work-life balance implementation plan. Concentrating on the process highlighted a number of problem areas: whether debriefing teams should be specialists brought in from outside or drawn from the collegial pool of hospital employees; how those doing the debriefing were to fit this function on top of their standard duties, especially when the incident was at an awkward time of the day or week; and how debriefing can be separated out so that it is a safe process for the staff concerned.

A solution will require a careful reconciliation of conflicting views on best practice, and the allocation of additional resources, but improvements are possible. “Balance” needs a lot more than flexible hours and working arrangements!

The Kapiti Train

People travel from diverse locations to any one workplace, but public transport is not “seamless”. Catching one train or bus to a more distant residence can make a huge difference in the amount of commuting time involved. Staff at Kirkcaldie and Stains, who live on the Kapiti coast find that if they catch the 5.15 pm train, they get home a full hour or more earlier than if they get the first available train after the store closes at 5.30!

Kirkcaldie’s found that if Kapiti train commuters started at 9.00 am with store set-up duties, and took a half hour lunch, they could finish at 5.00 pm, get the early train, and have that extra hour-plus at home at night: a huge improvement to the quality of life. The company also found that other staff had complementary lifestyle interests, such as dropping children off at school, going to the gym or walking the

dog before work, so staggered start and finish times “matched” different lifestyle imperatives.

It takes a bit of effort to work out how to fit these differences together, but it suits both parties: employees get hours of their choice and the store avoids the extra costs of having all staff covering the full stretch of “set-up to closing” hours.

APPENDIX 1:

WORK-LIFE BALANCE
WORKPLACE PROJECT



APPENDIX 1: WORK-LIFE BALANCE WORKPLACE PROJECT

Work-life balance is about people feeling satisfied with the way they divide their time and energy between paid work and all the other things they need and want to do. Work-life balance is important for people of all ages and stages of life. It is important for individual employees who may have family responsibilities or are active in their communities, for those who are keen to study, to keep fit, to play sport and to enjoy life. It is also important for employers because employees who are satisfied with their work-life balance are more likely to bring enthusiasm, energy and commitment to their work.

Research has repeatedly shown that there are significant business benefits associated with implementing work-life balance policies. In a Department of Labour scan of more than 85 case studies of organisations implementing work-life balance policies, employers experienced benefits such as:

- improved recruitment and retention rates, with associated cost savings;
- reduced absenteeism and sick leave usage;
- a reduction in worker stress and improvements in employee satisfaction and loyalty;
- greater flexibility for business operating hours;
- improved productivity; and
- improved corporate image, becoming an 'employer of choice'.

The Workplace Project

An overall aim of the Government's Work-Life Balance Programme is to provide best practice information and tools to public and private sector New Zealand workplaces to assist them to develop work-life balance solutions that meet the needs of both their businesses and their employees. In support of this objective, the Workplace Project aims to assist 14 large organisations with advice and information to enable them to develop and trial practical work-life balance tools. The tools will be evaluated following their implementation and the resulting best practice information will be made widely available to workplaces, employers, employees, and unions.

Project aims and objectives

From this Project, the Department hopes to gather practical tools and resources that have been tested and proven successful in New Zealand workplaces, as well as information about which work-life balance "solutions" are best suited to particular working arrangements. Where possible, the Department will build on existing tools and resources, including the recent resource on work-life balance produced by the State Services Commission.³ This information will then be disseminated to other New Zealand employers. As such, a goal of the project is to "test" some tailored work-life balance solutions in order to develop tools that match the needs of New Zealand workplaces.

³ State Services Commission (2005) *Work-Life Balance: A resource for the State Services*. Wellington.

Key principles

The Project operates on the basis of a number of principles including:

- using an approach that balances individuals and organisational needs (win-win solutions);
- operating under a partnership model, where employers, employees, and other parties in the workplace, such as unions, each have a voice;
- facilitating inclusive and innovative problem-solving and decision-making processes; and
- a commitment to improving the organisation of work at all levels.

What the project involves for participants

While each organisation may tailor the project to suit the needs and nature of their business, the following are some of the critical steps in the process:

- identifying current work-life balance policies and practices in the organization
- conducting an employee survey and/or focus groups with managers and staff (all questionnaires etc developed and administered by the Project Team) to assess current work-life balance problems;
- gathering baseline data including statistics related to retention and staff turnover;
- establishing a working group with staff and union representation, where there are unions represented in the workplace;
- working with a specialist human resources consultant to identify issues, develop and agree changes to work patterns;
- implementing new ways of working that meet the needs of the business and employees (which might range from very minor to fundamental); and
- participating in a series of evaluations of how the work-life solutions have impacted on employee statistics, satisfaction and business performance.

Who are the participants?

Christchurch Casino	Fulton Hogan (Canterbury Region)
City Care	Hutt Valley Health
Compac Sorting Equipment Ltd	IndeServe
Department of Labour	Kirkcaldie & Stains
Education Review Office	MAF Quarantine Services
Express Couriers Ltd	New Zealand Police
EziBuy	Tip Top Bread (George Weston Foods)

How were they selected?

The workplaces were recruited from industries where there are existing skill shortages as well as recruitment and retention issues. An analysis of skill shortages areas and work arrangements associated with work-life conflict suggested that appropriate sectors included manufacturing; hospitality; roading construction; retail; and information technology. Priority was also given to organisations employing more vulnerable workers in low paid and lower skilled occupations.

↘ FOR FURTHER INFORMATION ON WORK-LIFE BALANCE, VISIT WWW.DOL.GOVt.NZ OR PHONE 0800 20 90 20

