
Report To:	Policy & Resources Committee	Date:	12 August 2014
Report By:	Corporate Director Education, Communities & Organisational Development	Report No:	HR/15/14/AW
Contact Officer:	Steven McNab, Head of Organisational Development, Human Resources & Communications	Contact No:	Ext 2016
Subject:	Work-Life Balance Policy		

1.0 PURPOSE

- 1.1 The purpose of this report is to seek Committee approval to implement the Work Life Balance Policy which is attached at Appendix 1. This policy has been developed to support the Council's Organisational Development Strategy and to meet the requirements of recent legislative changes which extend the right to request flexible working to all employees, not just those with dependants.

2.0 SUMMARY

- 2.1 The promotion of flexible working patterns can promote a good work-life balance, reduce unauthorised absences from work and employee stress, and improve the performance and productivity of our workforce. There are also other benefits in regards to more efficient use of physical resources such as office space and ICT equipment, and in having a committed and engaged workforce who are able to take advantage of these attractive benefits, thus heightening our reputation as an employer of choice.
- 2.2 There is a number of different work attendance patterns already in place across the Council linked to the existing Family Friendly Policy. These include: part time working, job sharing, compressed hours, home-working, shift working and flexi-time. The attached Work-Life Balance Policy is designed to complement the existing Family Friendly Policy and provides guidance to employees and managers to ensure a consistent approach in the application of the Policy, particularly around dealing with individual requests.
- 2.3 The Work-Life Balance Policy extends the right to request flexible working, currently only formally available to those with dependants, to all employees. This is in light of the employment legislation which came into effect in June 2014, which will extend this right to all employees who have 26 weeks service with their employer.
- 2.4 Subject to Committee approval, the attached Work-life Balance Policy will be combined with the existing Family Friendly Policy and communicated to the workforce as appropriate. Relevant on-line and face to face training will also be further developed to ensure a consistent application of the Policy.

3.0 RECOMMENDATIONS

- 3.1 That Committee approve the Work-Life Balance Policy attached at Appendix 1.
- 3.2 That Committee note that flexible working requests will continue to be monitored via workforce information and activity reports to the Corporate Management Team.
- 3.3 That the revised Work-Life Balance Policy is communicated to the workforce and that relevant online and face to face training be developed to ensure consistent application of the Policy.

Patricia Cassidy
Corporate Director Education, Communities
& Organisational Development

4.0 BACKGROUND

- 4.1 Work-Life Balance is the commonly used phrase to describe a range of atypical employee attendance patterns which can be beneficial to both the Council and employees. From June 2014 government legislation widens access to the right to apply for flexible working to all employees with at least 26 weeks service. Current ACAS advice states: *"The Government proposes to extend the right to request flexible working to all employees; they will remove the current statutory procedure for considering requests. Instead employers will have a duty to consider all requests in a reasonable manner; however, business will have the flexibility to refuse requests on business grounds."*
- 4.2 Requests under the Work-life Balance Policy can only be approved following careful consideration of the impact on Service delivery and is therefore not an automatic entitlement to change. The Work-Life Balance Policy attached provides information to employees and managers in relation to the application of the policy, including service impact considerations and acceptable reasons for rejecting any requests.
- 4.3 The existing Family Friendly policy allows employees with dependants to make requests for flexible working and they can request any pattern/method which suits their personal needs. Requests made via the Family Friendly policy are generally accepted. Requests from other employees are made from time to time and are considered on a case by case basis with no statutory obligation on the Council to consider them.
- 4.4 Expanding the access to flexible working patterns can promote a good work-life balance, reduce unauthorised absences from work and employee stress, and improve the performance and productivity of our workforce. There are also other benefits in regards to more efficient use of physical resources such as office space and ICT equipment, and in having a committed and engaged workforce who are able to take advantage of these attractive benefits, thus heightening our reputation as an employer of choice.
- 4.5 As indicated in paragraph 4.3 above there are a number of different work attendance patterns already in place across the Council linked to the existing Family Friendly Policy. These include: part time working, job sharing, compressed hours, home-working, shift working and flexi-time. The attached Work-Life Balance Policy is designed to complement the existing Family Friendly Policy and provides guidance to employees and managers to ensure a consistent approach in the application of the Policy, particularly around dealing with individual requests. The proposed Work-life Balance policy opens up the various work-life balance options to all employees which meets the requirements of the recent legislation.

5.0 PROPOSALS

- 5.1 That Committee approve the Work-Life Balance Policy attached at Appendix 1.
- 5.2 That Committee note that flexible working requests will continue to be monitored via workforce information and activity reports to the Corporate management Team
- 5.3 That the revised Work-Life Balance Policy is communicated to the workforce and that relevant online and face to face training be developed to ensure consistent application of the Policy.

6.0 IMPLICATIONS

Finance

- 6.1 Any changes that are agreed under this Policy will require Head of Service approval.

Financial Implications:

One off Costs

Cost Centre	Budget Heading	Budget Years	Proposed Spend this Report £000	Virement From	Other Comments
N/A					

Annually Recurring Costs/ (Savings)

Cost Centre	Budget Heading	With Effect from	Annual Net Impact £000	Virement From (If Applicable)	Other Comments
N/A					

Legal

- 6.2 Meets requirements of revised June 2014 employment legislation.

Human Resources

- 6.3 Positive OD development which meets OD Strategy goals and objectives.

Equalities

- 6.4 Has an Equality Impact Assessment been carried out?



YES (Policy fully satisfies an equality impact assessment and is being brought in to comply with changes to flexible working legislation.)



NO - This report does not introduce a new policy, function or strategy or recommend a change to an existing policy, function or strategy. Therefore, no Equality Impact Assessment is required.

Repopulation

- 6.5 Enhances Council as a modern and flexible employer, which is attractive to potential employees coming into the area.

7.0 CONSULTATIONS

- 7.1 The Trades Unions have been consulted and are supportive of the new Work Life Balance Policy.

8.0 LIST OF BACKGROUND PAPERS

- 8.1 Appendix 1 - Work Life Balance Policy,

Organisational Development, Human Resources & Communications

Work Life Balance Policy

Version 1.0

Produced by:

Organisational Development, Human Resources & Communications

Inverclyde Council
Municipal Buildings
GREENOCK
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June
2014



**INVERCLYDE COUNCIL IS AN EQUAL OPPORTUNITIES EMPLOYER
THIS POLICY BOOKLET IS AVAILABLE ON REQUEST, IN LARGE PRINT, BRAILLE, ON
AUDIOTAPE, OR CD.**

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1. Introduction to Work-Life Balance Policy & Procedure

- 1.1 The Council understands that the promotion of flexible working patterns can promote a good work-life balance, reduce unauthorised absences from work and employee stress, and improve the performance and productivity of our workforce. There are also other benefits in regards to more efficient use of physical resources such as office space and ICT equipment, and in having a committed and engaged workforce who are able to take advantage of these attractive benefits, thus heightening our reputation as an employer of choice.
- 1.2 There are many variations of work attendance patterns already worked by many employees, mainly under the Councils Family Friendly Policy and this policy is being introduced to comply with the 2014 legislation which extends the right to request flexible working to all employees. The Family Friendly Policy still applies to those employees with dependants.

2. Scope, Eligibility and Principles

2.1 *Scope & Eligibility*

- 2.1.1 This policy & procedure will come into effect from 30th June 2014.
- 2.1.2 The Work-Life Balance Policy & Procedure ensures that the Council demonstrates best practice and compliance with the June 2014 legislation which extends the right to request flexible working to all qualifying employees.
- 2.1.3 Requests to alter working patterns can be made by all full time, part time, temporary and permanent employees covered by the following conditions of service and who have 26 weeks continuous service at the date of application:
 - Inverclyde Council Conditions of Service for Local Government Employees;
 - Scottish Joint Council for Building & Civil Engineering Operatives, Engineering Craftsmen, Electricians & Plumbers;
 - Scottish Negotiating Committee for Teachers (SNCT);
 - Scheme for Salaries and Conditions of Service laid down by the Joint Negotiating Committee (JNC) for Chief Officials of Local Authorities (Scotland).
- 2.1.4 Qualifying employees may submit 1 request per year. Additional or earlier requests may be considered in exceptional circumstances.
- 2.1.5 Note that for Teaching employees, only part-time working and job share requests can be fully considered due to the nature of the profession and delivery of education services.
- 2.1.6 Employees who have dependents who wish to apply to make a change to their working arrangement for family friendly reasons, should make their application using the Flexible Working Form. This is to allow the council to monitor flexible working requests from those employees with dependants alongside other work-life balance requests.

2.2 Principles

- 2.2.1 The Council is keen to support as many employee led requests as possible and managers will fully consider all requests made. Where a request cannot be accommodated, the reasons will be explained and will normally be in line with the reasons outlined in Section 4 of this Policy.
- 2.2.2 When a service management led move leads to a different way of working, the objective will be to seek the agreement from all affected employees, and only as a last resort would any change be imposed with due consultation and notice periods and full consideration of the circumstances.

3. Service Impact Considerations

- 3.1 Employees and managers should consider the following before requesting or agreeing to a Work-Life Balance request:

- Customer/Client Impact;
- Finance/Additional Costs – normally there should be no additional costs;
- Statutory Responsibilities (e.g. Legal requirements, certain staff to client ratios);
- Size of team, e.g. impact on others/workload if a working pattern is changed;
- Rotas, e.g. would approving a request negatively impact well established rotas for covering workload/important times;
- Known problematic absence levels/holiday periods (e.g. are there staffing/cover issues due to attendance issues such as high absence or a large periods of annual leave to be taken);
- Nature of work being undertaken;
- Management or support responsibilities (e.g. does employee support a client who requires services on a specific schedule/cover arrangements);
- The need for managers to be at a place of work to effectively manage.
- Attendance patterns of other employees in teams;
- Impact on the individual employee making the request (workload etc.).
- Exigencies of the service
- Practicality of working hours, e.g. proposed certain services require to limit the variety of start and finish times to allow more efficient management of staff and service delivery.

The above list is not exhaustive and is provided for illustrative purposes only.

4. Reasons for Rejecting Requests

- 4.1 The following list provides some guidance on what may be considered as acceptable reasons for rejecting a request under the Policy. Please note that this

is not an exhaustive or mandatory list and that individual circumstances should be taken into account when considering any requests:

- Insufficient work during the period the employee proposes to work;
- Burden of additional cost – normally requests must be cost neutral to be approved;
- A detrimental effect on the ability to meet customer demand;
- An inability to reorganise work amongst existing employees;
- An inability to recruit additional staff (e.g. to fill part of a post if employee requests less hours);
- A detrimental impact on quality or performance;
- Inability to effectively manage performance
- Planned structural changes (e.g. the timing is not good as service is reviewing how it operates and no decisions can be made until afterwards);
- Corporate position and wider implications due to volume of requests.
- The post holder has supervisory or line management responsibilities that require them to be available at all working times in line with the attendance of their team or customers;
- The employee has an absence level greater than 9 days (or pro-rata equivalent) in the 12 months leading up to the request (note that absences relating to disability, gender, age or race may be discounted as these are protected characteristics under the Equality Act 2010 – HR advice will be provided in this area).
- Inability to meet Statutory Responsibilities

The above list is not exhaustive and is provided for illustrative purposes only. Managers will liaise with Human Resource for advice if there is any concern over reasons for rejecting a request.

- 4.2 Where a request is rejected, an appeal can be made to the next level of manager and should be submitted within 5 working days of the rejection being received. The appeal must outline why the employee believes the rejection is not reasonable. Appeals will normally be heard within 28 days by a Corporate Director or other appropriate senior officer not involved in the decision making.

5. Employee Led Requests

- 5.1 Individual employees and groups of employees can make requests under the Policy and will do so following the Procedure in Appendix 1, Part 1.
- 5.2 The proposed start date of the change should normally be at least 8 weeks from when the written request is submitted to allow time for full management consideration, employee meetings, and any required administrative changes to take place.

6. Approval Process for Employee Request

- 6.1 All decisions on requests made must be ultimately approved by the relevant Head of Service. Line Managers will also undertake discussions with more senior managers as part of their decision making and completing the necessary paperwork in line with the Procedures in Appendix 1, Part 2.

7. Service Led Changes

- 7.1 Service Management may consider posts or groups of posts which may benefit from introducing new ways of working. For example if there are considerable potential service delivery or efficiency benefits to be gained from making a change to working patterns/methods as well as

providing a greater opportunity for Work-Life Balance for employees, but where those employees have not requested a change.

- 7.2 In these circumstances, the proposals will be formulated with the support of Human Resources and include full consultation with Trade Unions, with the ultimate goal being able to gain agreement on any changes.

8. Monitoring Arrangements & Contractual Status of Agreed Changes

- 8.1 Any changes agreed under the scheme will be subject to at least annual review. Managers will consider if arrangements are still a best fit and to determine if any changes are required consultation will begin with HR involvement.
- 8.2 In some circumstances, trial periods may be agreed in the first instance and it is important that a decision is made to either agree to the change or revert to previous way of working at the end of the trial period. Trial periods should normally last no longer than 3 months.
- 8.3 Where there is a large demand or numerous staff wishing to change their hours/working arrangements but not their contractual (paid) hours, it will be acceptable for managers to agree a rota of arrangements, for example if 4 employees request to move to condensed hours, managers may agree a few months each as an operational but not contractual change.
- 8.4 Any arrangements under this policy which are for a reduction in hours are normally permanent, unless otherwise agreed (for example during a trial period). There is no right to revert to full time hours once a permanent change to reduced hours has been agreed.
- 8.5 Requests which do not effect contractual (paid) hours may be agreed on a temporary basis. End dates or review dates should be clearly documented and adhered to.

9. Work-Life Balance Options

- 9.1 There are a variety of work-life balance options open to employees and services, the majority of which are explained in this section. It may be possible to combine options, or to have options which are not listed in this section considered;

- Part-Time Working
- Job share
- Term-Time Working
- Compressed Hours
- Mobile/Home/Flexible Working
- Annualised Hours
- Flexitime/Flexible Hours System
- Shift/Rota Working

9.2 *Part-Time Working*

- 9.2.1 Part time working is where an employee's contracted weekly working hours are less than the contracted hours of a full-time employee, i.e., less than 37 hours per week. The salary , holiday

entitlement and other conditions of service such as sick pay and maternity, paternity and adoption pay of employees who work part-time are calculated on a pro rata basis, according to the hours worked.

9.3 *Job Share*

- 9.3.1 Job share is where two employees share the responsibilities of one full-time post normally evenly. At the point of application, there does not need to be an identified job share partner, but if it is not possible to find a partner within a period considered reasonable by management, then the job share arrangement cannot go ahead. There is a separate Job Sharing Policy available from HR and on ICON should further information be required.
- 9.3.2 Salary, holiday entitlement and other conditions of service such as sick pay and maternity/paternity/adoption pay of employees who work job share are calculated on a pro rata basis, according to the hours worked by each sharer. A job-sharer is differentiated from a part-time worker in that a job-sharer has a job-share partner and this is important when one part of the job-share post becomes vacant as the sharing partner, under the Councils Job Share Policy, has the right to be offered the remainder of the post or if unable to accept it, remain in their post until efforts to recruit a new job-sharer have been exhausted.
- 9.3.3 A range of job-sharing arrangements can be agreed but the most common are on an hourly basis: split-day (morning/afternoon) or split-week (2.5 days per week or 2/3 days on alternate weeks but paid in equal amounts).

9.4 *Term-Time Working*

- 9.4.1 Term time working is where an employee attends work during the school timetable and does not work during the school holidays. Term time working is most common to services that provide and operate primarily during the school term, but is not restricted to these services (for example an employee in a post not connected to school term but for whom term-time working arrangements would suite their personal circumstances).
- 9.4.2 The employee's salary and holiday entitlement is pro-rata'd based on hours worked and weeks worked, and is paid in equal amounts over 12 months.
- 9.4.3 It is essential to stress that in term-time working, annual leave is allocated during the pre-determined school holidays only, and cannot be taken at any other time.

9.5 *Compressed Hours*

- 9.5.1 Compressed hours is where an employee works their contracted weekly hours over fewer days e.g. a full time employee may work 4 extended days rather than the usual 5 days within the working week or; their contractual hours over 9 days per fortnight instead of 10 days. It is also possible for part time employees to consider this under this Policy, for example 18.5 hours per week - 18.5 hours worked over 2 days rather than the traditional 2.5 days or 20 hours per week – 20 hours worked over 2.5 days rather than the traditional 3 days. Compressed hours per day must normally not exceed 9.25.
- 9.5.2 Although the working pattern may vary, an employee receives their salary in equal instalments. This way of working is advantageous in many ways and complex in others, and is it expected to be popular and frequently requested, as such, separate guidance is available from HR and in ICON on this approach.

9.6 *Flexible/Home/Mobile Working*

- 9.6.1 The Council has produced separate and full guidance for Flexible/Home/Mobile working, available [here on ICON \(HR Policies A-Z\)](#). Currently, any requests to move to these ways of working, other than in exceptional circumstances, will be service led. Employees may make a request for this way of working but should be aware that they are more difficult to agree as this way of working is relatively new, subject to development, and due to the complexities around ICT requirements, office/desk space availability, and health and safety considerations. To provide an overview of what these ways of working mean, the separate guidance outlines the categories as follows:

Flexible Worker

Works out of different locations. However, is office based for in excess of 50% of their time. Tasks can be carried out remotely, no need for a fixed base. Able to operate from a range of office locations by hot-desking:

- Works from multiple locations
- Requires mobile access to ICT systems
- Predominantly works across different locations
- Occasionally works from home – For example, 1 or 2 days per week

Mobile Worker

Works across various locations. Duties are carried out in the field – e.g., customers' homes, site visits, therefore no need for fixed base. Can hot-desk and /or home work. Is office based for less than 50% of their time:

- Works from multiple locations
- Requires remote access to ICT systems
- Predominantly works across different locations
- Occasionally works from home – 3+ days per week
- Hot-desks as and when required

Home Worker

Based at home for at least 90% of working time. No allocated desk - will book hot desk when time in office required. Duties carried out can be done out-with office environment:

- Works full time from home (90%)
- Provided with ICT equipment and support
- Requires remote access to ICT systems
- No office desk required

9.7 *Annualised Hours*

- 9.7.1 Annualised hours involve organising working time flexibly across a 12-month period rather than over a fixed standard working week. Although the working pattern varies, an employee receives his/her salary in equal instalments, irrespective of the actual number of hours worked in any given period.
- 9.7.2 Annualised hours are likely to be best suited to posts in which demand varies seasonally, and as such attendance is best suited to particular times of the year.

- 9.7.3 Annualised hours can be beneficial to employees and services, but can also raise complex issues around terms and conditions of employment, and as such, full consultation and HR involvement will be undertaken before any arrangement is implemented.

9.8 *Flexitime/Flexible Hours System*

- 9.8.1 This scheme is already in operation in some parts of the Council however, it may be possible to apply it in other areas. Full, separate details of the scheme are available from HR and ICON. Essentially it is a scheme which allows employees flexibility in relation to their start, finish and break times. It is designed to allow flexibility within the core-working day, rather than have set start, finish and lunch times each day, and on some occasions allow employees to take full or half days off as flexi-days as a result of hours being worked in a more flexible way.
- 9.8.2 Normally employees should use the scheme to allow greater balance in their working day. There may be occasions if an employee is particularly busy that they find themselves working more hours on a particular day, and balancing that out on another day, or, over a period of weeks, it may be that they can use accrued of these hours to take a day or part of a day off, subject to the limitations of the scheme as outlined in the full separate guidance.

9.9 *Shift/Rota Working*

- 9.9.1 This too is already in place in many areas in the Council. Any move to shift work will require careful consideration as it is important that staff are working at the times that meet service demands and that any costs associated with changes to working hours are fully considered in line with the Councils agreed working-time envelope. Moves to ways of working which propose a move into an atypical working envelope, as outlined in section 9.2 will be rejected on the grounds of additional cost.
- 9.9.2 Shift working can help meet demands placed on services and also provide an opportunity for a greater work life balance as often it means non-working days do not necessarily fall only on weekends. There are numerous models for shift working, but some of the most common are “4 on, 4 off” rotations, split shifts or “earlies/lates”. Examples of where this approach is already in operation are Community Safety/Wardens Service, Street Scene and Homecare that is, services where service provision is required out-with “standard” offices hours.
- 9.9.3 Shift working may be suitable if there are demands to be met particularly early in the morning, in the evenings or at weekends. Rotas play a key role in shift working, and rotas are normally agreed some time in advance.
- 9.9.4 It is likely that any move to shift work will affect a team/group of employees rather than an individual, as such, full consultation will be required with the affected group and HR will be involved in consultations.

10 *Combining New Working Arrangement with Flexitime/Flexible Hours system*

- 10.1 Flexitime must be managed carefully and if other ways of working are being adopted, the following guidance must be adhered to:

- (i) When applying the following approaches, flexitime can only be used to allow flexibility within the working day (i.e. moveable start/lunch/finish times), rather than to allow accumulation of days off:

- Compressed hours
- Shift/Rota working
- Home/Flexible working

10.2 If, under these arrangements, hours over and above contractual hours are worked as a result of high workload, any accumulation of hours should be with management approval only and may be taken as TOIL or paid overtime in line with the Conditions of Service for Local Government Employees.

10.3 It may be possible to apply flexitime in the normal way (i.e. in line with the established policy) together with the following approaches:

- Job Share
- Part-Time
- Term-Time (exceptional circumstances)

11. *Impact on Annual Leave, Public Holidays & Pay*

Any change under this Policy which reduces employee's contractual hours will require an adjustment of annual leave, public holiday entitlement and pay. This is a manual calculation in line and will normally be carried out by the Service with HR advice as necessary. Balances either owed to the employee to the service must be taken as annual leave and cannot be given as payment.

12 Work Life Balance Application Procedures for Managers and Employees

These step by step procedures should be applied with reference to the full Policy.

Step by Step Guide for Employee(s)

Step 1: *This step is optional but recommended as it allows both you and your manager to discuss theoretically what may be possible.*

If you are considering making a request under this policy, contact your Line Manager to request an informal meeting to discuss your initial ideas. If group request, no more than 3 employees should normally attend the informal meeting.



Step 2: Once you have decided that you wish to proceed with a request, complete the Work-Life Balance Request form, Part 1 (from ICON) and submit it to your Line Manager. Do not detach Part 1 from Part 2, your manager will complete Part 2.



Step 3: Expect to meet formally with your line manager to discuss your request form normally no later than 28 days after the form being submitted. If group request expect to elect no more than 3 colleagues to attend the meeting.



Step 4: Expect a verbal outcome of the decision on your request normally no later than 14 days after the formal meeting. Expect written confirmation from HR normally no later than 14 days of the verbal outcome.

Note: Advice can be obtained from Human Resource at any time.

Step by Step Guide for Managers

Step 1: *This step is optional as not all employees will request an informal meeting, it is however encouraged.*

- Arrange an informal meeting in response to employee request arrange a meeting no later than 14 days after receiving the request. If group request ensure that no more than 3 employees from the group attend the meeting.
- At this meeting discuss the initial ideas presented, prompt discussion around service impact and advise employee(s) that if they wish to proceed formally they should do so using the Work-Life Balance request form.



Step 2: Upon receipt of a Work-Life Balance Request form:

- Record the date the form was received and arrange to meet with the employee(s) no later than 28 days of the date received to discuss the request. If group request, invite no more than 3 employees from the group to the meeting. Meetings should last between 20-60 minutes.
- You can call the meeting earlier than 28 days were possible.
- In the time leading up to the meeting you should consider the impact of the request in line with the Policy, and discuss with your Corporate Director Head of Service and your initial recommendations to obtain their views.



Step 3: You must notify the employee(s) verbally of a decision within no later than 10 days after the meeting referred to in Step 2.

- Contact the employee(s) by email or phone to arrange a short meeting to confirm the outcome.
- Ensure you have approval from Head of Service confirming the decision to the employee. This should be obtained by email as these are required by HR for monitoring and administrative reasons.
- If request approved, confirm the start date to the employee and ensure this is at least 2 weeks in the future (to ensure confirmation letters and any changes to pay can be made on time)
- If request approved, agree monitoring arrangements with the employee, in line with the Policy.
- If request is being rejected – confirm the reasons why and advise employee that they have the right to appeal which will be officer led.



- Step 4:**
- Submit the entire, completed Work-Life Balance request form and Head of Service approval to HR within 2 working days of the verbal outcome. This will allow written confirmation to be sent to the employee (s) within 14 days of them being advised of your decision. You must do this also for both rejected and approved requests.
 - You will receive a copy of the written confirmation.

Note: Advice can be obtained from Human Resource at any time.

Appendix 1 - Work-Life Balance Request Form

(Available separately on ICON or from HR)

WORK-LIFE BALANCE REQUEST FORM

PART 1 – For Completion by Employee (s) – Complete all sections in Part 1.

Before completing this form, you should first read and understand the Work-Life Balance Policy. An informal meeting normally will have taken place with your manager in relation to your request before this form is submitted.

Name:				
Service/Team		Job Title:		
Line Manager:		Length of Service with Inverclyde Council:		Date Submitted

Equalities Monitoring Data

This information does not affect your application; it is gathered to ensure the Council complies with its Public Sector Equality Duty and is used for anonymous data monitoring reasons only. If Group request put all names, team name & length of service dates & Equalities Monitoring in a supporting document

Do you have caring responsibilities Yes Child or Children Under 18 <input type="checkbox"/> Yes – Other <input type="checkbox"/> No <input type="checkbox"/> Prefer Not to Answer <input type="checkbox"/>	Marital Status Single <input type="checkbox"/> Living with Partner <input type="checkbox"/> Divorced <input type="checkbox"/> Prefer Not to Answer <input type="checkbox"/>
Gender Male <input type="checkbox"/> Female <input type="checkbox"/> Transgender <input type="checkbox"/> Prefer Not to Answer <input type="checkbox"/>	Do you Consider yourself to have a Disability Yes <input type="checkbox"/> No <input type="checkbox"/> Prefer not to Answer <input type="checkbox"/>

1. Describe your current working pattern/method (days/hours/times worked):

2. Describe the working pattern/method you would like to work in the future (days/hours/times worked):

3. Describe how you think the proposed change will affect your Service:

4. Describe how you think any difficulties could be overcome:

5. Date you wish new arrangement to commence: (this must be at least 28 days from today's date)

Is your request for a Permanent or Temporary change:

(Note that if change is a reduction in hours it will automatically become permanent)

If Temp, requested End Date:

(Note that changes to working hours only may be agreed on a temp basis)

Send this completed form by email or hard copy to your Line Manager who will complete Part 2. This request will be considered in line with the Work Life Balance Policy, and your Line Manager will meet with you in line with the timescales outlined in the Policy and final confirmation of the decision on your request will ultimately be confirmed in writing from Human Resources.

PART 2: For Completion by Manager

You must meet with employee within 28 days of receiving their written request, sooner where practicable. Final decisions must be confirmed by Heads of Service. Outcomes should be confirmed verbally to the employee (s) and supporting documentation sent to HR who will confirm in writing.

Section 1 – Final Outcome

Approved: ☐ **Complete Sections 2 , 4 , 5 & 6**

Rejected: ☐ **Complete Sections 3, 4, 5 & 6**

Where alternatives has been suggested, discussed and agreed, this is categorised as “approved”.

Section 2 - Approved Requests - Final Details of Working Arrangements

Weekly Contractual Hours:

Nature of Change:

- Part-Time Working ☐
- Job share ☐
- Term-Time Working ☐
- Compressed Hours ☐
- Mobile/Home/Flexible ☐
- Annualised Hours ☐
- Flexitime ☐
- Shift/Rota Working ☐
- Other ☐

Details if Other:

Working Pattern (if relevant):

Mon

Tue

Wed

Thu

Fri

Sat

Sun

If Group Request: detail each individual working pattern and attach to this form when submitting to HR.

Effective Date:	
Section 3 – Rejected Requests - Select Reasons	
Insufficient work during the period the employee (s) propose to work. <input type="checkbox"/>	Burden of additional cost. <input type="checkbox"/>
Detrimental effect on the ability to meet customer demand. <input type="checkbox"/>	An inability to reorganise work amongst existing employees. <input type="checkbox"/>
An inability to recruit additional staff. <input type="checkbox"/>	A detrimental impact on quality or performance. <input type="checkbox"/>
Planned structural changes. <input type="checkbox"/>	The post holder has supervisory or line management responsibilities that require them to be available at all working times in line with the attendance of their team or customers. <input type="checkbox"/>
Other (details required in Section 4) <input type="checkbox"/>	Employee(s) do not have 26 weeks service at date of application. <input type="checkbox"/>
Employee has absence level above Council Target <input type="checkbox"/>	Statutory Responsibilities could not be met if request approved <input type="checkbox"/>
Section 4 – Additional Comments /Information	

Section 5 – Manager Check List

1. Head of Service supports your decision (email confirmation received to this effect should be attached to this form when submitting to HR).	<input type="checkbox"/>
2. Employee(s) advised verbally of outcome & if relevant, start date/end date. (Start date must be at least 2 weeks from when you submit this form to HR).	<input type="checkbox"/>
3. If group request, full list of employees and changes attached and send together to HR will this form & Head of Service/Finance Approval	<input type="checkbox"/>

Section 6 - Confirmation

Name & Job Title (Print):	
Signature (or by Email is acceptable):	
Date:	

Submit this form fully completed (even if request rejected) to: human.resources@inverclyde.gov.uk

HR will:

- Register the request and outcome to monitor activity under the policy;
- Make any necessary changes to HR/Payroll systems;
- Confirm the arrangements in writing to the employee;
- Provide manager with copy of the letter.