

Flexible Work Arrangements Toolkit

and Case Studies

Exploring options for a better work/life fit at FedUni
A manager/staff member guide



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Caution: The most up-to-date version of this Toolkit is available at www.federation.edu.au/worklife

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Welcome

Are you wondering if you need to make some adjustments to your work arrangements?

Has your work or personal life changed lately?

Are your needs different now?

What can FedUni do to help create an environment for staff that provides a 'better fit' between their work and family lives?

Are you a manager of a staff member who wants to explore changes to their work arrangements?

Well, read on and explore!



Flexible work arrangements at FedUni

Local flexibility arrangements	Changed hours of work	Working from home
Changed time fraction	Flexible work hours	Purchase of additional leave (48/52)
Children in the workplace	Job share	Leave without pay
Reduced hours approaching retirement	Accessing long service leave	Long service leave on half pay

Information relevant to these and other flexible work arrangements can be found on the Leave and Work Life Balance website at www.federation.edu.au/worklife

How to use this toolkit

If you find that you have a need to reconsider your work arrangements, maybe it's time to explore this toolkit. This toolkit can be used as an information source or as a series of guided conversations to help managers and staff members work through the process of changing work arrangements. Relevant pages could be used to record negotiations and then kept on staff files for reference.

Managers and staff may come up with their own innovative solutions, but will need to check that they do not breach any industrial award or agreement. Planning together provides an opportunity to get an outcome that is satisfactory for all parties.

Getting started

Considering flexible work arrangements can be a complex process for staff and their managers. The first 'solution' that springs to mind may not be the only, or even the best one.

Both managers and staff need to approach the process with open minds and explore what arrangements will work for individuals and their work areas. All parties need to take the time to be informed about the various arrangements and the implications of each.

It is important to consult Human Resources throughout this process as they can assist with the design and implementation of flexible arrangements and can provide advice on any legal and industrial implications.

FedUni encourages staff and managers to consider flexibility in their work practices:

- in emergency or one-off situations
- for planned or short term purposes, involving a defined period of time
- on a long-term or permanent basis.

It is important that managers recognise the needs of staff and their efforts to make their work and family lives a 'better fit'.

Similarly, it is important that staff members are realistic about the opportunities (and barriers) facing them in seeking flexible work arrangements.

Managers should be aware that there are legislative (and FedUni) expectations around providing flexibility for staff. Legal expectations include staff being able to request a change to work arrangements if they require flexibility, and the way that managers must respond. For help with any preparatory thinking, contact Human Resources.

The seven-step process described opposite provides a guide for both managers and staff to work through when considering flexible work options. Each of these steps is dealt with more fully on the following pages.

A range of case studies is provided to illustrate that creative and workable solutions can be found for individuals and their work areas – and are beneficial to FedUni.

A seven step process



Step 1

Identify the issue or need

Step 2

Explore what FedUni offers

Step 3

Refine the options

Step 4

Weigh up the implications

Step 5

Develop a plan

Step 6

Put the plan into action

Step 7

Review the arrangements

Step 2

Explore what FedUni offers

There is a variety of flexible arrangements available to staff to address their individual needs, but whether or not they are an option in every case depends on individual circumstances and work areas.

A key factor is finding the balance between what is right for the individual and manageable for the work area at the same time. Both staff and managers should take time in exploring what is available and possible at FedUni.

The case studies at the end of this toolkit are excellent 'idea starters' as they illustrate the variety of options staff have used and combined to meet their needs.

To consider



Staff member

1. Make time to look at the Leave and Work Life Balance website to see what flexibility FedUni can offer. It gives FedUni's policies and entitlements relating to flexible work options, but does not give every possible flexibility option. www.federation.edu.au/worklife
2. Make a list of the arrangements that look at first glance as though they could meet your needs. Then explore which options might best fit your needs (and your work needs). Maybe it is a combination of options.
3. Be prepared to discuss your situation and possible outcomes with your manager or other FedUni people to help explore the options. Contact Human Resources to discuss options involving leave or for additional information on employment conditions.
4. If it is relevant, acquaint yourself with the Children in University Activities Policy and Procedure at <http://policy.federation.edu.au>
5. If it is relevant, acquaint yourself with the Working from Home Policy and Procedure at <http://policy.federation.edu.au>

To consider

Manager

1. When you are first approached by a staff member about making some adjustments to their work arrangements, you will not know how far along they are with their thinking. They might be coming straight to you for information as a first step or might be more advanced in their plans and want to discuss what would work in your work area.
2. When you are first approached you might start thinking about what the potential issues may be and how you might manage them.
3. Referring your staff member to this toolkit may be your first step, but you might also have to ask some pertinent questions before you really know what they want from you at this stage. The challenge is to find out whether they want information or answers.
4. A staff member may want to discuss with you how various flexible work arrangements might affect their career and any job issues that may arise.
5. Take care not to be hasty. Off-the-cuff or hasty comments about what is and is not possible might start discussions off on a wrong footing. Remember that it can be daunting or difficult for some staff to raise topics such as these with their managers, particularly when it relates to seeking work changes for family or health or lifestyle reasons.
6. It may be useful to update your knowledge on FedUni flexible work arrangements by referring to the Leave and Work Life Balance website – www.federation.edu.au/worklife
7. If relevant, acquaint yourself with the University's Working from Home Policy and Procedure at <http://policy.federation.edu.au>
8. For assistance to explore employment and/or Equal Opportunity expectations contact Human Resources or Equity and Equal Opportunity.

Step 3

Refine the options

Now is the time to really examine whether the arrangements that you think will address your needs are realistic in your work environment, and as useful as you first thought.

A good and fair solution will depend on the needs of individuals, the respective work areas, and maybe even times of the year in work areas that have timetables for particular actions (such as end of financial year, term breaks, enrolments).

Remember that a solution may range from a simple change, to a combination of options that can work together to achieve the required flexibility.

The case studies at the end of this toolkit are very useful to see how other staff and managers found a match for their needs.

To consider

Staff member

1. Which of the arrangements that you have investigated would work best for you and your work area? Some of the arrangements you have looked at may be great for you, but unsuitable in your work area, or the timeframe that you have.
2. Will your preferred arrangement(s) give you the flexibility you seek? Are any of them a better 'fit' for you than others?
3. Do you simply prefer one arrangement to another? Which one is it?

Manager

1. Ask the staff member what they really want to achieve and then work with them to see how you can manage it. There may be more than one way to provide the flexibility that your staff member needs.
2. Consider what the issues are for your work area. For example, if a staff member wants to cut back on time, don't immediately think of how the job can be done in a shorter time. Maybe you can employ another staff member to backfill, or maybe you have another staff member who can pick up extra time.

Check box

Staff and managers could use the check box below to do a simple analysis of possible options and then use it as a discussion guide. Make a note of any extra issues you need to deal with.

Some arrangements to consider	Will help achieve what is needed for individual				Will help achieve what is needed for work unit			
	Yes	No	Maybe	Sometimes	Yes	No	Maybe	Sometimes
Working from home								
Flexible start and finish times								
Time in lieu								
4/8/52 arrangements								
Job share								
Changed time fraction								
Using recreation leave in advance								
Other arrangements								

Step 5

Develop a plan

A good plan clearly sets out how the preferred arrangement could work. It does not have to be written; however, a written plan can be a useful tool to ensure that managers and staff are discussing and negotiating the same thing.

Although some parties may have put a lot of work into getting to this stage, remember that your plan is a negotiating tool and may still change during the process of any negotiation. The goal for everyone is to develop workable outcomes. See the case studies at the end of this toolkit to see how some staff and managers developed written plans and how mutually beneficial parameters were set up.

Plan for flexible work arrangements at FedUni

Name	
Date	
Preferred option	
Hours and time of work	
Technology issues	
Any change to roles and responsibilities	
Time frame for new arrangements	
Start date	
End date	
Proposed review date	
Required attendance in the workplace	
Specific issues	
Additional management issues (eg replacement staffing)	

To consider

Staff member

1. Although flexible arrangements need not be documented, it is a good idea to write down the details of your preferred option so that you and your manager are clear about as much as possible.
2. Be prepared to consider and address the concerns that your manager may raise.
3. Be aware that once a new arrangement is entered into you will generally not be able to change it until the agreed period for the changed arrangements has ended, unless by mutual agreement.

Manager

1. Be prepared to consider the options that your staff member has proposed. Be honest about any concerns that you have regarding the effect the proposed changes will have and your ability to accommodate them.
2. Consider developing a plan for your staff member if they have requested your help. It would be useful to involve your staff member along the way rather than just present it as *fait accompli* when it is done.
3. It is useful to use this planning process to identify and address any management implications, and to discuss with your staff member any concerns you may have.

Help!

It is possible (but hopefully unlikely) that despite the best of efforts, a staff member and manager may not be able to reach an agreement or plan that they are both satisfied with. If this situation should occur, then it is time to seek further guidance from senior and/or specialist FedUni staff, to ensure all options, and industrial/legal implications have been explored, and to help to arrive at a final outcome. Managers and staff are encouraged to seek assistance, information and/or resources.

Managers considering refusing a request for flexible arrangements should seek advice from Human Resources before making a final decision.

For advice about interpretation of staff access to entitlements under awards, enterprise agreements and policies contact Human Resources.

For advice and assistance to managers and/or staff exploring pros and cons of flexibility options, and to staff who have concerns about fairly accessing leave and flexible work options contact Human Resources or Equity and Equal Opportunity.

Step 6

Put the plan into action

Once the proposed plan has been worked through to a satisfactory conclusion for all parties it is time to put it into action by the agreed date. Remember, it is necessary to contact Human Resources to check that the plan complies with FedUni and legislative requirements, and to ascertain what must be done to formalise the arrangement.



To consider

Managers and staff members

1. Have you contacted Human Resources? Remember, you need to check the final details with Human Resources before the new arrangement is implemented.
2. Do you have to write a letter? This will be necessary if there is to be any change to the employment contract and Human Resources may have to prepare a contract variation.
3. Does this arrangement need approval by a senior manager in your area?
4. What records do you need to keep locally? Maybe your finalised plan from the previous section is sufficient.
5. Think about when you will need to review these arrangements. It could be a timely note in your diary, during annual review processes, or at a pre-determined time of the year (for example, the end of semester for teaching staff).
6. How will you go about reviewing the arrangements?
7. Who will initiate the review of arrangements? How far in advance will you start?

Step 7

Review the arrangements

The aim in reviewing flexible work arrangements is to ensure that both managers and staff members have practices that meet their needs, and that the arrangements are agreed to rather than presumed.

The review process itself may be a simple conversation or may involve more investigation and/or negotiation.

Basically there are three outcomes that would arise from the review phase:

- 1. There will be no change.**
In this case, new dates for the period of time and the next review date need to be agreed.
- 2. The arrangements will finish, and the staff member will revert to the original work mode.**
Remember to re-visit Human Resources to be certain about entitlements and what needs to be done at this stage.
- 3. Individual or workplace needs will have changed and necessitate new arrangements.**
If this is the case, then some (or all of) the seven-step process described in this booklet may need to occur all over again.



Useful references

Internal

Work & Family/Personal Life Balance website
Leave and Work Life Balance website at
www.federation.edu.au/worklife

Maternity Leave Toolkit and Job Split, Job
Share, Job Support Toolkit
www.federation.edu.au/worklife

Children in University Activities
Policy and Procedure
<http://policy.federation.edu.au>

Breastfeeding of Infants Policy and Procedure
<http://policy.federation.edu.au>

Working from Home Policy and Procedure
<http://policy.federation.edu.au>

Case Studies

Flexible Work Arrangements



Note: These case studies reflect real FedUni stories and experiences, but names and job titles have been changed.

Flexible work hours – Manager perspective

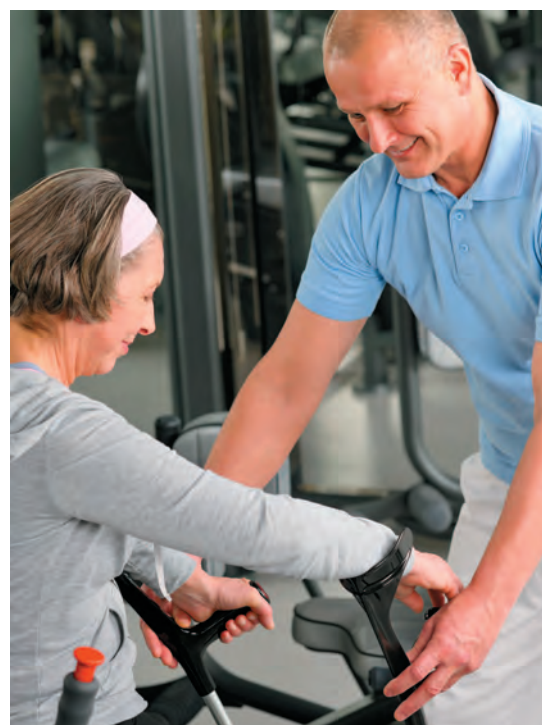
Stephen, Manager

In our area one of our staff members works her 0.5 hours in a very flexible way that suits the peaks and troughs of her responsibilities. Mary coordinates advertising and promotion activities. This job has defined parameters and clear outcomes and so it is possible to plan it on an annual basis each year.

Human Resources have done a calculation of the number of hours that must be worked over a year for a 0.5 position such as this. The calculation takes into account such things as leave entitlements and public holidays. Mary and I then work with the estimated hours and schedule advertising and promotion activity for the whole year, taking into account outcomes we want to achieve and any related timelines. Then we agree what times are busy and mean extra working time for Mary, and those that are less busy and suitable for her to take off as blocks of time. After that, we agree how many hours must be worked on a weekly basis to fulfil all the conditions.

In an arrangement like this the key thing is managing the hours. Dedicated staff can easily work more hours than they need and as a manager I need to be aware of this. Mary keeps a record of her hours on a spreadsheet that is updated fortnightly. To check that we are on target I monitor it regularly and sign it fortnightly.

This arrangement suits Mary as it enables her to plan other activities for the year and accommodate the needs in her personal life. For me it is also useful as it suits the demands of the promotion work and enables us to retain her expertise. It is not always easy to replace experienced personnel, or to find staff that can accommodate this type of flexibility. FedUni has invested time and resources in developing personnel like Mary, and so it is a win-win situation for the organisation as well.



Reduced time fraction

Sue, Administrative Assistant

I have been working in a full-time position at the University since 1991. Recently I had some health concerns and was getting very tired and run down. I tried making up the time I took off for medical appointments, but it was making me stressed trying to catch up. I realised that I needed to cut down on my work commitments until I recovered my health, so I negotiated with my manager to drop back to 0.8 for 12 months.

Having that one day per week off work has made a big difference to my wellbeing. I am not so tired at the end of the week and have more energy to give to work when I am here. The 0.2 time fraction that I am not working has been made available to two other staff members who have picked up an extra day per week for approximately six months each.

The 12 months of reduced time fraction are nearly up and I am currently evaluating what I will do for next year. I will talk it over with my manager soon and together we can make a decision.

Approaching retirement – Reduced hours and flexible use of hours

Theo, Coordinator, Information Management Systems

I have made use of the arrangement offered to full UniSuper members whereby they can reduce their full-time load to a part-time fraction (must be 0.5 or above) prior to retirement. This arrangement allowed me to reduce my full-time load to 0.8, providing that I gave an agreed retirement date sometime in the next three years. I am looking to retire during this timeframe and so this suits me quite well.

Initially I wrote a letter to my manager, outlining how this arrangement might work for my work area, along with the pros and cons of implementing it. I felt that reducing my time fraction would be of mutual benefit to the University and to me. It meant that the University knew of my retirement well in advance, thus providing a two-year transition period in which I could transfer my knowledge of the information management systems to someone else before I retired. I could act in a mentor role for this person and so my specific expertise would not suddenly be lost to the organisation.

Once this was agreed to and checked with Human Resources staff, I dropped back to four days work per week. The University still pays my superannuation contributions at 100% of my original contributions and so I have not lost any of those benefits by choosing this arrangement. I had to be sure though, that this is what I wanted to do, as once I set a date for my retirement I would not be permitted to change my mind.

Coinciding with these arrangements I took on an additional project which involved working across the University. This has given me even more flexibility as, like a lot of projects, it has busy times and quiet times. I was able to develop an annual project plan and know what hours I must work over the whole year to fulfil my role and achieve the agreed outcomes. I have been able to spread those hours where they are needed; at busy times I work more hours and when it is quiet I can take some time off. I keep a record of my hours on a spreadsheet and my manager regularly reviews my project outcomes.

For me, reduced hours of work have meant that I have more time to explore what I might like to do once I do retire, and set up some strategies for when this time comes. I have had the chance to ease myself into some community activities and set up a workshop for my hobbies. As my wife is still working full-time I use my day off to do some household jobs so that we can spend more leisure time together on the weekends. This has been beneficial for both of us.



Multiple arrangements – Allocation of teaching hours, working from home and children at work

Helen, Lecturer

A few years ago I started lecturing at the University on a casual basis and I was always given plenty of choice about when I had classes. My first semester here I primarily taught night classes as I had a 12-month old child and that worked out best for childcare. As my daughter has grown I have gradually built up my hours to become full-time.

When my daughter was at kindergarten I was able to spend one to two days a week working from home. Now that she is at school my classes are arranged mostly between the hours of 9.30 am and 2.30 pm. I let my students know that I have this time commitment and we work around it where necessary. On the days that I collect my daughter from school, I can return to work and be available for students then. I let the students know in advance that I may have my daughter with me.

I often email (usually when I am home at night) to keep in touch with students. Some of them take advantage of this and will email me several times during the night so that we can sort things out. Students can send their work for comment, go away to work on it and then make contact later.

My Head of School has been very supportive of me and willing to negotiate teaching and working times that fit in with my family responsibilities. My fellow workers echo the same family atmosphere. The result is that I am a happy, healthy staff member who is not stressed about my family.



Use of long service leave and bringing children to work

Gloria, Administrative Officer

To deal with my family commitments I have been using part of my long service leave to take extra time during school holidays over the past few years. I have been putting it together with my recreation leave to make sure that I am able to care for my children during their school holiday periods and pupil-free days.

Each year I check on my long service leave entitlement and what funds are available for coverage. Then I speak to my supervisor about what dates I would like for leave and how it can be covered. Then I put it all into a memo and send it to my manager and the Head of my area for approval.

I am fortunate to be able to avoid the costs of childcare by using my long service leave in this way. My manager is happy to negotiate these arrangements with me and it works out well for my work area also. Taking a four-week long service leave block in January allows someone to be employed to backfill me for that period. In effect it provides an opportunity for an extra staff member. Using long service leave suits me because it means that I still get paid for a full 52 weeks. When I have used up all my long service leave I will consider the 4/8/52 arrangement to deal with my family commitments.

My work unit has also been great about negotiating bringing my children to work on occasions when arrangements break down or a child is sick. Initially my manager thought that children should not come into the workplace, and raised concerns. But, rather than making a hasty decision, she explored the issues with me and others in the work group, and went through the issues in a transparent way (eg issues around safety, privacy, disruption). We then came up with agreed parameters that all were comfortable with, about when children could be here, under what conditions, and what to do if other colleagues wanted to raise any concerns.

Obviously if a child is sick, my preference would be to have them at home with me. But sometimes they're not very sick – just needing to be taken from school. So, in some cases, I pick up my child, come back to work to do what needs to be done (rather having a colleague picking up the load) and then go home.



Flexible hours

Elizabeth, Student Learning Skills Officer

I had a 0.5 position for three years prior to taking 12 months maternity leave. My manager was prepared to be flexible with my employment arrangements when I returned to work and the two of us negotiated what would be manageable for all parties.

Some of the negotiated flexibility included:

- No appointments with students at lunchtimes while I was breastfeeding. This enabled me to go to the crèche to breastfeed my daughter.
- Starting ½ hour later in the morning so that I could take my child to crèche, and working ½ hour later in the afternoon when my husband was able to do the crèche pick-up.
- Working extra hours at some times through the year so that I could take that time at home during the weeks when the crèche was closed.

I always made up any time that I missed in starting later or taking a longer lunch break to take my child to kindergarten. My time fraction has now increased and I am willing to be flexible about seeing students at busy times as needed, even though it is not my core work role now.

I am fortunate that my job allowed such flexibility and am very grateful to my manager, Vicki, for negotiating win-win solutions for both of us.

48/52

Stacey, Information Resources Officer

I am currently working full-time and have two children aged one year and five years. I have been very lucky with my childcare in that my mother retired at just the right time to care for my children this year, and that has been an enormous help.

My five year old is starting school next year and I have had to evaluate how I am going to balance everything with changing family needs. I have arranged with my manager to take up the 48/52 arrangements where I will work only 48 weeks but my pay will be spread over the whole year. This will allow me to have extra time off work to cover the school holidays.

My job is reliant on student contact and it makes sense for me to take time off when the students are not around. With the money saved from this arrangement someone extra can be employed for the busy times; so time with the students will be maximised and everyone will benefit.

For me this is a better option than part-time as it will cover school holidays and allow me to engage in things like VicSwim with my family.

My manager agreed open-heartedly to this arrangement. As the time draws near I will make contact with Human Resources to see what needs to be done to formalise it.



48/52 – Manager perspectives

Paul, Manager

A staff member here has worked 48/52 since 1999. She has a family and this arrangement allows her to take time off to meet family responsibilities. Having previously worked in schools, the ability to undertake employment with 8 weeks holidays each year allowed her to commit to full-time work much more easily than if only four weeks were available. Essentially, the 48/52 arrangements have enabled full-time work and family responsibilities to be accommodated, meeting the needs of both our Section and the staff member.

This arrangement is reviewed annually and the staff member outlines her leave plan in advance, nominating the weeks that she needs off work. On most occasions leave requirements meet the down times in the work area, so the 48/52 has caused minimal disruption. However, on some occasions, the system has also enabled the staff member to take leave during “busy” times. More recently it has provided flexibility to take additional leave on a regular basis for further study. The process of establishing the 48/52 week year is quite simple with Human Resources distributing a ‘48 week year letter of offer’ following our request. Next year this staff member has elected to revert to full-time as per her contract.

Working from home

Toula, Manager

I manage an ICT business unit which includes a Technical Manager, Web Developer and Programmer. I am responsible for supervising two part-time staff members who have website coordination roles within the School.

Working from home commenced informally as a result of a conversation between myself and my Head of School about trying to better balance work, study and family commitments. In the initial stages I had to make decisions about how I could best establish an area at home which could be used for work. My home office contains all the usual requirements such as a desk, chair, filing cabinet, note-book computer, printer and telephone. I have upgraded my internet connection at home and can access the University phone, email and files by remote access. All of this capability makes it possible for me to do my job efficiently from home.

Effective communication across the team is essential. Apart from regular face-to-face and telephone communication we utilise a range of tools and services to achieve this goal. We use instant messaging and can see when each of us is online and available. It allows us to communicate quickly and easily. We also share access to specialised web-based systems which support us in delivering client services. These include our online helpdesk, list of tasks to do, calendar, document library, project management and contact management systems. These resources can be accessed by all my staff, no matter where we are.

Most of the work of our team is project-based and involves the development and delivery of services via the Internet. There is a great deal of respect and trust between all members of the team. It is not necessary for me to be on campus to directly supervise other team members or to perform many aspects of my role. We have found that as long as clients are provided with timely and effective services and support it really does not matter where team members are physically located. Because of its project-based nature our work usually involves defined activities, outcomes and timelines. When I work from home I find that I can really focus my concentration.

I attend regular meetings on campus and also meet with clients at various locations throughout the state. When scheduling meetings on campus I try to cluster these. This reduces the number of days that I am on campus and makes for a more efficient use of my time.

Over a two-year period I have progressively refined my work patterns to make working from home as efficient and enjoyable as possible. One of the longer-term benefits has been that I am more accessible and can better support my children out of school hours. I have achieved greater flexibility in structuring my time around their needs and can work without relying on childcare or additional family support.





Contact us

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