SAMPLE TOOL FOR MANAGERS – ASSESSING A ROLE FOR FLEXIBILITY POTENTIAL

Whether a role is suitable for flexible working will depend on several factors. These can include the duties and responsibilities of the job itself, operational requirements, impact of changes upon colleagues or customers, the amount of collaboration required with other people (and the extent to which it needs to take place in real time), availability of enabling technology or the need for work to be completed at a specific place or time.

Flexibility can generally take place in **when** work is done, **where** work is done, and **how and what** work is done. Reflect upon the work undertaken by the individual requesting flexibility – you may find it helpful to have a copy of their job description.

**When** work is done.

Some roles require work to be undertaken at a particular time, such as opening a shop at set opening hours. Other work can be done at any time - examples might include analysing data, developing a project plan or writing up research. Consider the tasks in the job description and reflect:

* Can the work that be undertaken at any time (within reason) or
* Can the work only be undertaken at a specific time?

**Where** work is done

Some roles demand that the work is undertaken at a particular location, such as cleaning or providing personal care. Other forms of work will be more flexible and can be done from any location where there are relevant tools and technologies. Consider the tasks in the job description and reflect:

* Can the work be undertaken anywhere (within reason) or
* Can the work only be undertaken in a specific place?

**How and what** work is done

Reflect on the nature of the activities of the role. Do they involve working with others, or do they involve thinking, reflection and independent work? Are the tasks routine or transactional? Does the role demand close supervision?

Tasks that involve working and collaborating with others can be further separated into:

* + Synchronous activities – work undertaken with other people at the same time (for example taking part in a meeting with colleagues, delivering a presentation), and
	+ Asynchronous activities – work that requires working with others but not necessarily at the same time. An example would be several colleagues working together to produce a report, but each of them can write their parts separately and share their ideas via email or a shared online space.

Consider the collaboration tasks undertaken by the employee:

* How many of them are synchronous?
* How many of them are asynchronous?

Some jobs may involve an element of each of these separate factors. For example, it may include tasks that demand work is done at a particular time but some tasks that are not. A role may also demand some elements of synchronous collaboration and some aspects of collaboration that can be done asynchronously.

Reflect on the duties and responsibilities of the role. Based on the employee’s job description and day to day activities, consider the following:

* What percentage of the tasks need to take place at a certain location? What percentage could take place elsewhere?
* What percentage of tasks need to place at a particular time? What percentage of tasks could take place at a time different to ‘standard’ working hours?
* What is the nature of the work being undertaken? How much of the work requires synchronous or asynchronous collaboration? How much requires independent work or work that requires supervision? How much of the work is routine or standardised?
* Can the different types of tasks be organized in such a way they can be undertaken together (eg can all of the thinking and reflecting tasks be undertaken on the same day?)

If the answers are not easily identifiable, consider asking the employee (where they are in post) to keep a note of the work they undertake each day, as categorized above, over an appropriate time period (such as a couple of weeks) to allow you to analyse this more fully. Ask them to note down their day to day tasks as well as when, where and how they take place.

Following this data collection, review the information to identify what patterns have emerged and what form of flexible working would most suit the nature of the work being undertaken (you can refer to Chapter 2 to remind you on the different forms). For example:

* Synchronous collaboration tasks may be suitable for flexi-time (as employees will need to work together at the same time), where asynchronous collaboration tasks could be suitable for most forms of flexibility.
* Location independent tasks that can be done at any time of the day or week may be particularly suitable for remote or homeworking (as they will not need to be undertaken at a specific time or place)
* Routine tasks or independent work may be suitable for remote or homeworking or part time / staggered hours working (as they may only need some interaction with other team members).

Also consider some of the following before making a decision:

* What changes could be made or tried? How could work be organized differently to allow for non-time / location dependent work to be undertaken at different times or in different places?
* Where work requires collaboration, does this need to be face to face or could other forms of collaboration such as virtual or online engagement work just as well?
* Is the workload realistically achievable in the proposed working pattern?
* Where work requires high levels of concentration, could this be done at different times or in different places?
* What tasks could be split between different individuals (such as through a potential job share situation) or across different days or hours of the week?

Also consider:

* What are the potential benefits to the individual or organization of the particular form of flexible working requested?
* What are the potential disadvantages to the individual or the organization of flexible working – and how might these be overcome?
* What tools (or access to technology / systems) would be required to support the flexible working requested?
* Are there any costs to the organization of the proposed working pattern? This could include costs of recruitment (such as a job share partner) or purchase of additional IT equipment.
* What might the impacts be of on the work of the rest of the team?

The following should not be taken into consideration when determining if a role is suitable for flexible working:

* The reason that the individual is making the request (unless it relates to a disability).
* The seniority of the person making the request
* Whether accepting a request will encourage others employees to make flexible working requests.
* How work has been undertaken in the past.
* The attitudes of other team members to flexible working.
* Your personal preferences about where and how people work.

Examples of role assessments

A role that requires both writing and delivering training courses is likely to have a combination of thinking and collaboration activities. The collaboration activities (eg the delivery of the courses) will usually need to be done face to face and at a specific time and location. The thinking element of the work (the development of the training materials) could be done at any time or location. This could lend itself to a split between homeworking and office based working, or flexible hours on days where there is no training delivery.

A role that requires large amounts of routine administration might have deadlines (such as the completion of reports at certain times of the month) but the tasks do not need to be completed at set times of the day and do not require collaboration with team members, only access to systems, therefore allowing for flexibility with daily or weekly hours, or location.

A role that involves providing college students face to face support will require large amounts of synchronous collaboration activities at certain times of year. When students are not present, the work may change to tasks that are more focused on thinking or transactional tasks (such as planning or writing reports), allowing for different hours or patterns of work at different times of the year.

Where a role involves serving customers in a café, the work will typically require synchronous collaboration, and the work can only be done at a specific time and specific place. Such roles will not be suitable for some forms of flexible working such as remote working or flexi-time. It might however be suitable for job sharing, part time working or self-rostering.