



Improve your home life. Improve your work life. Improve your home life. Improve your work life. Improve your home life. Improve your work life.

Work-life balance toolkit for education professionals

Work-life balance



Association of Teachers & Lecturers **the education union**

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What is work-life balance?

Work-life balance is essentially about choice and flexibility, balancing life and work, balancing the needs of both the school (employer) and members (employees) and the optimum environment for high performance and satisfaction at all levels. ATL has prepared this toolkit to help members achieve this balance.

The first step is recognising that work-life balance is an issue for both employers and employees.

The second step is recognising that the solution will be different for everyone and that consultation is an essential part of the process.

Work-life balance policies need not be expensive options. Different solutions satisfy different circumstances and consultation should allow scope for imaginative and productive alliances to be secured in each school.

“Work-life balance is not just about women juggling work, home and family – although that is certainly an important part of it. It is also about adjusting working patterns and policies so that everyone – regardless of age, race or gender, can find a rhythm that enables them more easily to combine work with their other responsibilities or aspirations.”
Creating work-life balance, DfES



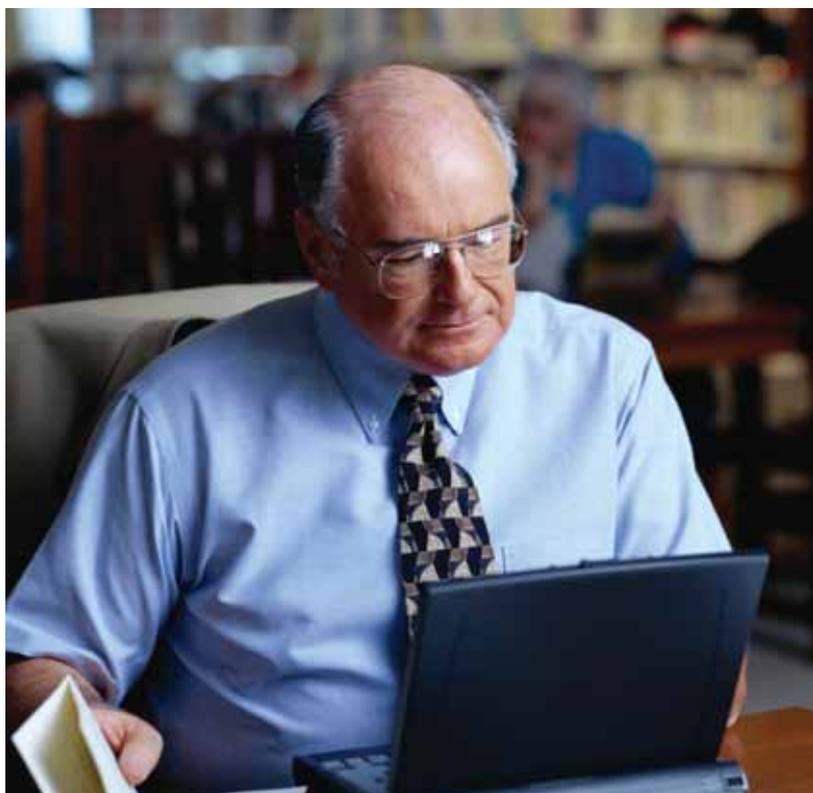
ATL's objectives for members

The ATL Executive Committee agreed to prepare guidance and best practice on, and then campaign for the promotion of, the following objectives in relation to the terms and conditions of members working in schools:

- ▲ A right to a reasonable work-life balance and school-level action to identify and address workload problems
- ▲ A right during each seven-day period within term time to one and a half days or more of continuous undirected time
- ▲ Contractual 'family-friendly' and sickness benefits, including sick pay, maternity pay, paid time off for the care of dependants and paternity pay, which are better than minimum statutory entitlements
- ▲ Consultation with staff before changes are made to terms and conditions of employment.

The main concerns of members are:

- ▲ 21 administrative tasks to be taken over by non-teaching staff
- ▲ 38-hour maximum yearly cover of absent colleagues
- ▲ Adoption of one day per fortnight for preparation and planning



Members highlighted paperwork (especially form filling) as an area of work that had become more demanding or time-consuming as well as increased teaching time and the growing demands of pastoral care.

The National Workload Agreement provides a useful benchmark and some schools had already started to do something about aspects of workload, by employing more administrative support and staff generally, improving IT and providing more non-teaching time.



“A contractual right to ‘family-friendly’ policies and sickness benefits”

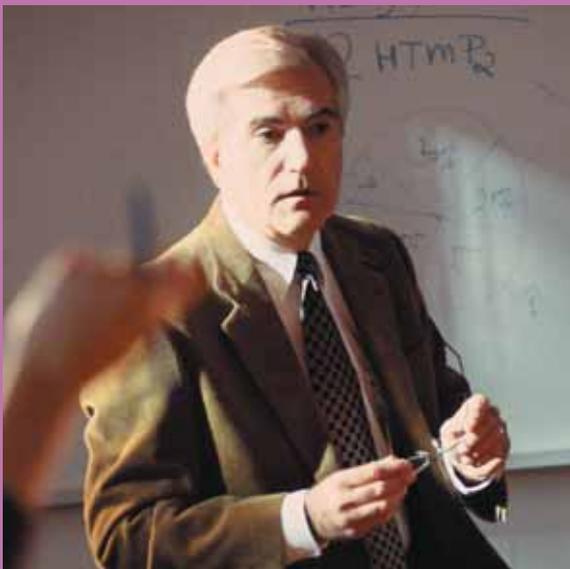
Work-life balance



What are the benefits of work-life balance policies?

Productivity – greater loyalty
Efficiency – greater energy
Motivation – empowerment
Recruitment – a 'first choice' employer
Retention – keeping good staff
Training – engaged workforce
Reduced absence
Greater flexibility

Responsibility and ownership
Feeling valued
Improved relationships at work and at home
Improved self-esteem
Improved confidence and concentration
Greater control
Balance in whole life



**Benefits for your school
or college**

Benefits for members

Work-life balance

How has the education sector tackled work-life balance?

The government has recognised that education professionals have an excessive workload. They have done something about it for teachers working in the maintained sector.

Working with unions, managers and employers, the government sought to identify positive ways to tackle teachers' excessive workload by creating the Workload Agreement in 2003.

A major part of addressing workload has been the greater involvement of support staff in the delivery of education. Teachers should now not routinely be required to undertake a list of 21 administrative tasks (full details of these follow). These measures were phased in from 2003-2005 for schools in England and Wales.



The Workload Agreement states that teachers in the maintained sector should have:

- ▲ A reasonable work-life balance (with headteachers responsible for ensuring this)
- ▲ A timetable that provides for the reasonable allocation of time in support of their leadership and management responsibilities
- ▲ A 38-hour limit on the amount of cover for absent colleagues they can be required to do in each academic year, with an intention to reduce this requirement continually to the stage where teachers will rarely be required to cover
- ▲ A guaranteed 10% of their timetabled teaching to be used as preparation, planning and assessment (PPA) time during the school day.

While the Workload Agreement only applies to the maintained sector it is clearly a very useful benchmark for all teachers, whether working in the maintained or independent sectors, and independent schools are already using it in their discussions about tackling excessive teacher workload.

The list of 21 routine tasks that teachers in the maintained sector should not routinely be required to do is overleaf.

"Where it has been implemented, the agreement has had a great effect on teachers' lives. It means they can have a reasonable work-life balance. Our members report that they are coming back to work with renewed vigour and enthusiasm."

Dr Mary Bousted, general secretary of ATL

Work-life balance



21 administrative tasks teachers should not routinely be required to undertake

- ▲ Collecting money from pupils and parents: a designated member of office staff should be responsible for receiving and recording money
- ▲ Investigating a pupil's absence: teachers should inform the relevant member of staff when a pupil is absent from a class, but they should not, for example, have to telephone a pupil's home
- ▲ Bulk photocopying: eg for the use of the whole class
- ▲ Typing or making word-processed versions of manuscript material and producing revisions of such versions
- ▲ Word-processing, copying and distributing bulk communications, including standard letters, to parents and pupils
- ▲ Producing class lists on the basis of information provided by teachers: teachers may need to be involved in allocating pupils to particular classes
- ▲ Keeping and filing records including those based on data supplied by teachers. Teachers may be required to contribute to the content of the records
- ▲ Preparing, setting up and taking down classroom displays. Teachers will still make decisions about what material should be displayed in their classrooms
- ▲ Producing analyses of attendance figures
- ▲ Producing analyses of examination results
- ▲ Collating pupil reports
- ▲ Administration of work experience: teachers may still need to select placements and support pupils by advice or visits
- ▲ Administration of public and internal exams
- ▲ Administration of cover for absent colleagues
- ▲ Ordering supplies and equipment
- ▲ Ordering, setting up and maintaining ICT equipment and software
- ▲ Cataloguing, stocktaking, preparing, issuing and maintaining materials
- ▲ Taking verbatim notes or producing formal minutes of meetings: teachers may be required to co-ordinate action points if necessary
- ▲ Co-ordinating and submitting bids (for funding, school status etc): teachers may be required to co-ordinate action points if necessary
- ▲ Transferring manual data about pupils into computerised school management systems (teachers should not be expected to input initial data electronically)
- ▲ Managing the data in school management systems.



General time-management strategies

Some issues of workload can be addressed on a personal basis. The following useful suggestions come from a publication by Sara Bubb and Peter Earley of the Institute of Education: *Managing Teacher Workload*, Paul Chapman Publishing 2004.

Quality time

It is important to recognise that different individuals are more productive at certain times of the day. For the majority of people, they are freshest in the early part of the day, but for a minority their best working time is late at night.

It's been suggested that about 20% of our time is prime time, and that, used correctly, it should produce about 80% of our most creative and productive work. The rest of our time is likely to be of lower quality, and is nowhere near as productive.

Our creative thinking and our most difficult jobs, deserve some of our high-quality time. For example, important decisions need people's prime time, not the traditional slot of low-quality time at the end of the teaching day. As a consequence, it's becoming more common now for schools and colleges to timetable team meetings earlier in the day.

In low-quality time, we should plan to do things that are easy to pick up after interruptions. For example, do simple jobs like photocopying (if you haven't delegated them) before you leave for the day rather than at the start of the next, when you're at your freshest.

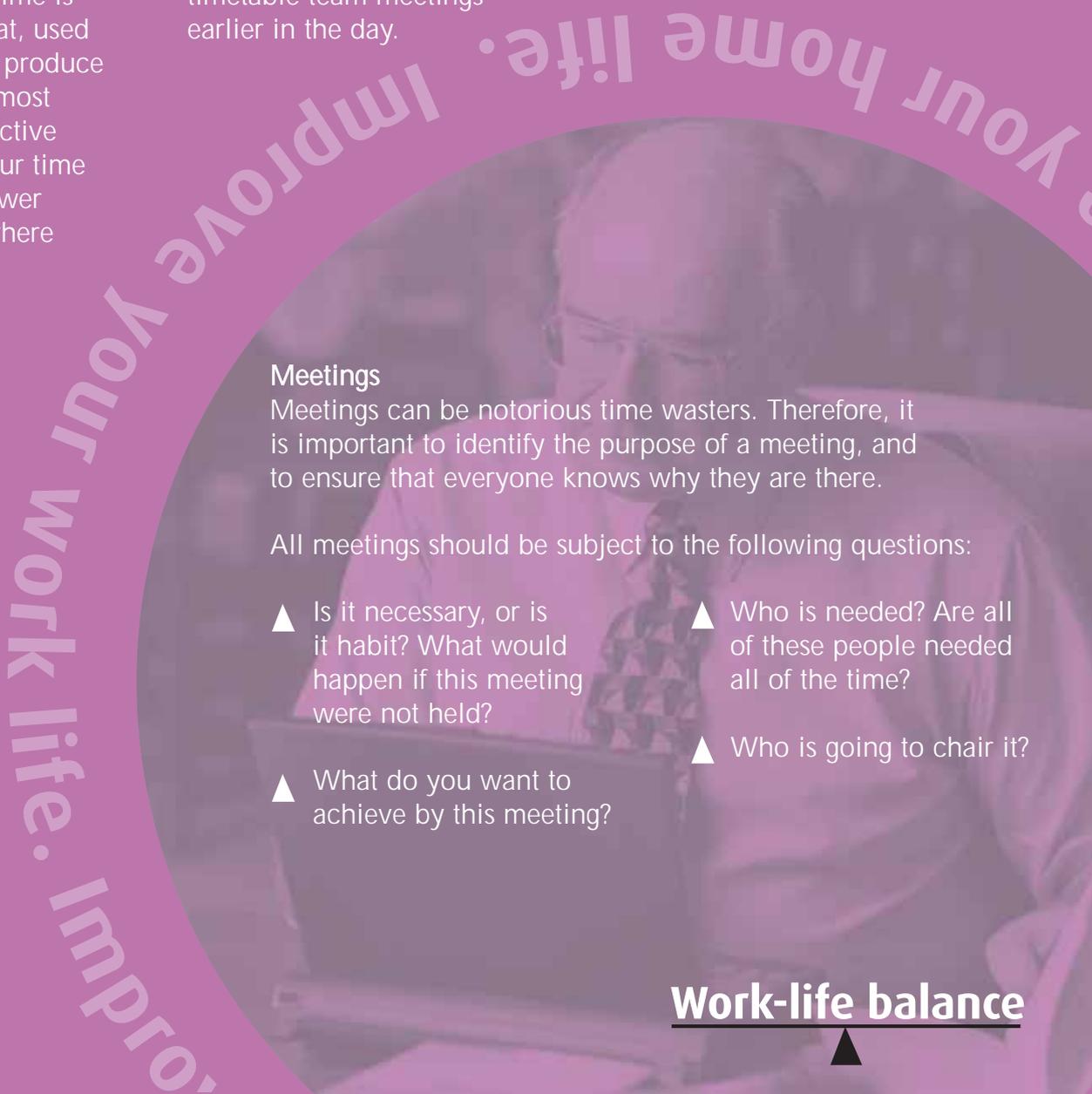
Meetings

Meetings can be notorious time wasters. Therefore, it is important to identify the purpose of a meeting, and to ensure that everyone knows why they are there.

All meetings should be subject to the following questions:

- ▲ Is it necessary, or is it habit? What would happen if this meeting were not held?
- ▲ Who is needed? Are all of these people needed all of the time?
- ▲ What do you want to achieve by this meeting?
- ▲ Who is going to chair it?

Work-life balance



Prioritising and work-time diary

One way in which we can improve our time management is to review the way in which we organise tasks. Whatever they are, it is best to divide them into bite-sized chunks by using the acronym SMART. Our task needs to be:

- ▲ **Specific:** clearly defined.
- ▲ **Measurable:** so that it's easy to see when it has been completed.
- ▲ **Attainable:** unrealistic targets are depressing, as we can't achieve them.
- ▲ **Relevant:** or appropriate, to current and future needs.
- ▲ **Time-limited:** with defined deadlines. Open-ended tasks have a habit of not getting done.

If each task that we plan is examined according to SMART criteria, it will be easier to achieve, and there is nothing better for reducing stress than the confidence born of success!

Now, once we have a SMART list of things that need doing, the next task is to prioritise them. If we do not, it is easy to feel helpless and stressed in the face of so many things that all need to be done instantly.

Organising tasks into some sort of order not only makes it easier to finish one thing before going onto the next, but it also legitimises the fact that some of the things have to be put off till later. This helps us to feel less pressured.

Give each task a letter:

- A – is for the top priority jobs – ones that must be done today
- B – is for jobs that should be done today

- C – is for those jobs that it would be nice to do today
- D – is for the low-priority jobs – you know you have to do them, but it's OK to pass them on to tomorrow's list of things to do

Ask yourself:

- ▲ How important is it?
- ▲ How urgent is it?
- ▲ How long will it take to do?
- ▲ What is the knock-on effect of this job?
- ▲ What will happen if I don't do it today?

Some jobs are so quick and easy to do that there is a psychological benefit in giving them As and crossing them off the list first. Other tasks, again in themselves fairly unimportant, have to be done before other, more important tasks can be completed, and these also deserve As or Bs.

There is sometimes a danger that 'urgent' tasks can crowd out more important tasks.

Priorities can change from hour to hour and you need to be flexible. It is a good idea to build in some slack.

Work-time diary

One of the problems of having an excessive workload is not having the time to look properly at what we are

doing to see if our work could be organised more productively. We need to know how long we spend on individual tasks before we can fully answer the questions "Do I really need to do this now? Could someone else do it? Could I do it more efficiently?" If workload is to be thoroughly addressed, education professionals need to audit how much time they spend on each task, and then consider if the tasks could be done more efficiently. In conjunction with the Institute of Education, ATL have successfully used self-audit work-time diaries to address workload issues.

Keeping a work-time diary

One way to audit your time is to keep a diary over seven days (including the weekend), recording each task and how much time is spent on it. Each day's record should cover all your time at work and any tasks completed outside school. You will probably find it easiest if you complete the record at convenient points in the day (for example break or lunchtime). It is important for you to have an accurate picture of how you have deployed your time. If you find that two or more activities are occurring simultaneously (eg your teaching is interrupted by a parent's visit) then please record the main activity only.



Example of work-time diary

Time	Duration in minutes	Work activity
07.50 - 08.00	10	Speak to Senco
08.00 - 08.15	15	Photocopying
08.15 - 08.45	20 10	Setting up room and a display
08.45 - 08.55	10	Morning meeting
08.55 - 9.05	10	Register
09.05 - 10.15	70	Teaching
10.15 - 10.30	15	Assembly - attended
10.30 - 10.50	20	Playtime - on duty
10.50 - 12.00	70	Teaching
12.00 - 12.10	10	Kept three children in
12.10 - 13.00	20 30	Lunch - tidying, setting up Talking to other staff
13.00 - 13.10	10	Register
13.10 - 15.00	110	Teaching
15.00 - 15.15	15	Home time, chat to parents
15.15 - 15.45	30	Tidying
15.45 - 17.00	75	Staff meeting
17.00 - 17.15	15	Sorted work
17.15 - 17.50		Travelled home
17.50 - 19.30		Domestic
19.30 - 20.00	30	Marking
20.00 - 21.00	60	Planning Cut out resources for tomorrow's lesson
Various	20	Doing this audit
Total		

Summary of the day

Summary of the day

At the end of each day, consider the day's work in terms of productivity, efficiency, the value for the pupils of the various activities and the degree of professional satisfaction you have derived from undertaking them.

Adding up the amount of time you spend on tasks tells you how long you are working. The summary looks at the value of certain tasks.

Analyse your working week

Compare how you spend your time with others in your department and school or college.

An analysis of your daily running record will give you more detail of exactly how you are spending your time within the various work activity headings. For instance, if you are unhappy with how long you are spending on lesson preparation and classroom organisation, you could look at your time diary to ascertain which of the elements – planning/preparing lessons, display, or setting up/tidying the classroom – are more time-consuming, and then address this when you draw up your action plan.



Drawing up an action plan

Now that you have the big picture of how you spend your time and you have decided what you would like to change, draw up an action plan of how you are going to change an aspect of your working day, possibly using ideas from other sections of the toolkit. You may want to ask yourself the following questions:

- ▲ What do you want to spend less time on?
- ▲ How are you going to do so? What implications are there for others?
- ▲ How much time are you going to save, and by when?
- ▲ Are you aiming for a radical or a gradual reduction?
- ▲ How are you going to measure your progress?
- ▲ How will you spend the time that you have saved?



Procrastination

Sometimes we waste time procrastinating rather than getting on with the job. In order to assess yourself as a procrastinator, score yourself depending on how strongly you think these statements apply to you.

<i>Do you strongly agree = 4; mildly agree = 3; mildly disagree = 2; strongly disagree = 1</i>		Score
1.	I can always find a reason for not tackling a task that I don't want to do	
2.	I need an imminent deadline before I get on with such a task	
3.	I put off tackling people if I think it's going to be unpleasant	
4.	There are too many interruptions and crises in teaching to allow me to accomplish anything that takes sustained effort	
5.	I like to tidy everything up before I get to grips with a task	
6.	When I know an unpopular decision has to be made, I tend to sit on the fence	
7.	I try to get other people to do the parts of my job that I don't like doing	
8.	My non-contact time is rarely used for marking or preparation	
9.	I am under too much pressure to deal with difficult tasks	
10.	I often neglect to follow up what has been decided at a meeting	
Total		

Procrastination Quotient Scoring

0 – 20 You are not a procrastinator

21 – 30 Although it is not a major problem, you do tend to put off tasks. Paying some attention to this area should help you improve your time management

30+ You have a significant procrastination problem and need to explore this further if you are to manage your time better

Solutions might include:

- ▲ Being aware that you're procrastinating
- ▲ Breaking large tasks into smaller ones
- ▲ Giving yourself rewards
- ▲ Tackling the unpleasant tasks first
- ▲ Considering the effects of not doing it
- ▲ Using the 'one hour' rule, i.e. deciding not to get up from the desk for one hour, but then having a short break



What next?

1. Once you have identified the workload issues in your school or college you will want to think about what improvements you would like to see. This may involve using suggestions made elsewhere in the toolkit, and you might also find the following working practice examples useful:

Working hours:

- ▲ Flexible working
- ▲ Part-time working
- ▲ Flexible job-share
- ▲ Home working for PPA
- ▲ Individualised working patterns
- ▲ A reduction in working hours
- ▲ A compressed working week.

Childcare, carers and domestic support:

- ▲ Subsidised childcare
- ▲ Emergency childcare options
- ▲ Assistance with funding for domestic help
- ▲ Assistance with signposting agencies for carers support
- ▲ Emergencies for carers.

Leave and time off:

- ▲ Sabbaticals
- ▲ Career breaks
- ▲ Carers' leave
- ▲ Maternity, paternity, parental and adoption leave.

Good practice and support:

- ▲ Induction programmes
- ▲ Training development and life-long learning
- ▲ Counselling and coaching available to all staff
- ▲ Monitoring and supervision.

2. Set up a working group involving management to review existing working practice and develop an action plan for implementing a work-life balance strategy in your school
3. If you need any support and/or advice from ATL please do not hesitate to contact us by emailing info@atl.org.uk.



What legal protection is there against working long hours?

The 1998 Working Time Regulations

The primary purpose of the Working Time Regulations is to safeguard the health and safety of employees.

The key features of the Regulations are as follows:

Working time

The working week is limited to a maximum of 48 hours, but this is averaged over 17 weeks. In residential institutions, the averaging period is 26 weeks. The averaging period disregards periods away from work for reasons such as sickness or maternity but, includes most periods of holiday – which tends to lower the average of hours worked. However, only time spent ‘working at the employer’s disposal’ and carrying out one’s activities or duties counts towards ‘working time’. It will not normally include, for example, time ‘on call’ or time spent working at home.

In the case of the weekly working hours limits, individual agreements are possible between worker and employer excluding the standard 48-hour limit. These agreements will have to be in writing and contain a notice clause, and the employer in these cases must keep records of hours actually worked by the individuals concerned. Further, no detriment can be imposed on employees who refuse to sign a working hours agreement.

Rest breaks

Most workers are entitled to an uninterrupted rest break of at least 20 minutes away from the workstation during the working day if it exceeds six hours.

Daily rest period

Most workers have a right to a daily rest period of at least 11 consecutive hours in each 24.

Weekly rest period

Employers must provide a minimum weekly rest period of at least 24 hours in each seven-day period for most workers – although employers can opt for 14 day averaging. The rest period is not required to include Sunday.

Annual leave

Workers are entitled to four weeks paid annual leave.

Night work

Night workers’ hours are limited to eight hours in each 24-hour period, averaged over 17 weeks. A night worker is one who, as a normal course, works at least three hours of daily working time between 11pm and 6am.

Record keeping

Employers must keep ‘adequate’ records to show that the average weekly working time limits are being observed. Records must be kept for two years. If, on the other hand, workers have made personal agreements to waive the 48-hour limit, then records of each individual’s actual working hours will need to be kept.



Partial exclusions

The legislation provides for some flexibility from the full rigour of the regulations, firstly to accommodate various sectors of employment and also to cover certain exceptional circumstances at work.

The key ones are:

- ▲ Foreseeable surges of activity
- ▲ Unusual and unforeseeable circumstances beyond the control of the employer (including accidents).

In each of these cases, the worker is not entitled to the standard daily and weekly rest periods nor to the daily rest break. However, s/he is 'wherever possible' allowed to take 'an equivalent period of compensatory rest'. Significantly, in these cases the limits on working time still apply.

Enforcement

As the regulations are essentially a health-and-safety measure, the working time (and night work) limits are enforced by the Health and Safety Executive. Employers who fail to comply could be prosecuted for committing a criminal offence.

Practical implications

The regulations in general do not dramatically affect most educational institutions.

Working time

The restrictive definition of 'working time' and its averaging over 17 or 26 weeks (which will inevitably include some school or college holiday within the calculation) prevents most teachers and lecturers from benefiting. Indeed, the fact that the 48-hour limit is averaged in this way will mean that, during term time, teachers may work considerably longer than 48 hours per week, without this contravening the regulations.

Nonetheless, some teachers working in boarding schools in the independent sector, where 'on duty' periods are especially onerous, may be affected. Note that boarding schools are not exempt from the normal 48 hours averaged limit.

Rest and breaks

Residential institutions, such as boarding schools, are excluded from the normal requirements on rest and breaks – but staff are 'wherever possible' entitled to claim 'an equivalent period of compensatory rest'.

Similarly, the flexibilities (see above) for 'surges of activity' and 'unforeseeable circumstances' are likely to apply to events such as school trips where short periods of unusually long working hours are required. Again, in these cases, compensatory rest should be given.



ATL's top seven tips for beating stress

1. Keep a diary

Keeping a diary for a couple of weeks can help you pinpoint the stress points in your life, be they events, times, places, people or simply trying to do too many things at once.

Once you have identified your stress points you can use the following techniques to try and mitigate their effects.

2. Talk

Talk through your diary with your partner or a good friend; just discussing things can often make people feel better. If the problems that you have identified occur largely in the workplace talk to your headteacher or principle to see if anything can be done to help.

3. Learn how to relax

Practise deep-breathing techniques Slowly inhale while counting to five, hold your breath for five seconds then breathe out slowly. Repeat this 10 times when feeling stressed, concentrating on nothing but your breathing.

Stretching Stretch the muscles of your neck and shoulders by keeping your shoulders level and trying to touch each shoulder with your ear. Look up at the ceiling, then down at the floor and then rotate each shoulder in a wide circle. Repeat five times. Open and close your jaw widely after each exercise since stress often causes tension in the jaw area.

Take time out For five minutes every hour, try to 'shut down' and think of nothing but your perfect situation. This could be a dream holiday, ideal partner or simply thinking about doing nothing at all. You will be surprised at how effective this can be at lowering stress levels.

At home A warm bath, especially on cold winter nights, will gently warm and help relax you.

4. Exercise regularly

You do not have to be a gym freak to get the stress-beating benefits of exercise. Even 20 minutes of brisk walking three times a week will help to reduce stress as well as promoting restful sleep. Yoga and Tai Chi are both excellent ways of relaxing.

5. Get a good night's sleep

Many people experience difficulties with sleeping during their lifetime and stress is one of the commonest causes. Tips for aiding a good night's sleep include:

Keep regular hours Going to bed and getting up at roughly the same time every day will train your body to sleep better by getting it into a regular rhythm.

Keep a pen and paper by your bedside Use them either to make a list before lights out of things that you need to tackle the next day or to write down (and thus 'dump') worries that may prevent you from sleeping.

Get some fresh air Evidence suggests that those who get sufficient natural daylight tend to sleep better at night.

Avoid tea and coffee in the evening Both are stimulants and can interfere with falling asleep and prevent deep sleep.

Avoid over-indulging Eating too much late at night can impact on your ability to sleep.

6. Don't smoke, and avoid excess alcohol

Alcohol and nicotine are both stimulants and will make it harder for you to relax.

7. Eat a balanced diet

Eating a balanced diet will help improve your overall health and well-being and will make you feel better in yourself, even in stressful situations.



Who to contact at ATL for advice and support

If you would like further information or assistance, please contact:

ATL's London office – tel. 020 7930 6441

ATL's Wales office – tel. 029 2046 5000

ATL's Northern Ireland office – tel. 02890 327 990

The organising team are also available for support with activity and training, call 020 7782 1599 for more information or email organise@atl.org.uk

To order additional campaign or recruitment materials, call ATL Despatch on 0845 4500 009, email despatch@atl.org.uk or order online at www.atl.org.uk. Please remember to allow 10 days for the delivery of your order.

Other sources of information

www.atl.org.uk

www.worksmart.org.uk

www.tuc.org.uk/work_life

www.dti.gov.uk

www.cipd.co.uk

www.employersforwork-lifebalance.org.uk

www.teachernet.gov.uk

www.teachersupport.net

www.wiredforhealth.gov.uk

www.hse.gov.uk

www.lsc.gov.uk

www.tda.gov.uk

www.dfes.gov.uk

Managing teacher workload – work-life balance and wellbeing by Sara Bubb and Peter Earley, published by Paul Chapman Publishing, 2004

