

## **Inland Revenue and the Public and Commercial Services union**

### **The company**

The Inland Revenue (now HM Revenues and Customs) is responsible for the administration of direct taxes, tax credits, child benefit, national insurance contributions and stamp duties; collects student loans payments, and enforces the National Minimum Wage. It has around 37 million customers and handles a yearly tax income of around £220 billion.

The Public and Commercial Services union is the largest civil services union, with 280,000 members. PCS represents 93% of Inland Revenue employees.

### **The workforce**

Number of employees 70,000

Percentage women 64%

### **The challenge**

The Inland Revenue needed to extend its opening hours to the public in order to provide a more accessible service whilst at the same time helping staff to have a good balance between work and personal life.

### **The response**

The OurTime project was a partnership between PCS and the Inland Revenue, with support from the TUC. Working together, union and management explored ways to give people more options about their working hours at the same time as allowing the business to open beyond the core hours of 9-5 and to open on weekends.

Surveys and focus groups were run to establish what staff wanted before matching staff and business needs. Three pilot studies were then established. An enquiry centre and telephone team pilot tested scope for extending opening to volunteers. The third pilot in the Risk, Intelligence and Analysis team tested the mutual benefit of increased flexibility for staff where there were no external customer interfaces. They tested a variety of flexible working arrangements including variable core time, personal core time, no core time, compressed working week/fortnight and banking time.

Three training packages were commissioned from specialists in the field and tested in the trial offices. The three packages helped managers managing a flexible workforce, team members work together more effectively, and the Inland Revenue organise work for flexibility and security.

Take up was very good, especially once staff saw the practical benefits of flexible working enjoyed by their colleagues. The project was successful on both a local and national scale.

The effect of the project on the offices and staff involved was to develop trust between employee and employer through working together and to strengthen links with the community. Staff were given the flexibility to better balance their work/life balance. Customers received an extended service and increased choice and flexibility.

The wider impact of the project was to create a model process which could act as a template for the rest of the Inland Revenue, and indeed a wider audience. An information pack called OurTime was produced, based on the process used by the project. It included:

- three specially commissioned training packages which can be used by any public sector organisation;
- a new Inland Revenue handbook on flexible options for staff;
- a booklet on how to set up a learning access point as part of a work-life balance initiative;
- a CD Rom of practical information including a staff survey on working time preferences, how to run focus groups with staff and ground rules for running pilot.

Whilst by no means a definitive model, it provides insights for organisations developing ways of addressing work-life balance and may be of use to those using the new Investors in People work-life balance model.

### **Business benefits**

Helping staff to juggle their commitments:

- Possible to reduce absences
- Improve staff morale
- Better able to cover peak times (ie. staffing profile matches customer demand).

Recognising diversity:

- Wider pool for recruitment
- Better reflection of customer base
- Staff with broader experience

Extending or improving customer access:

- Customers have choice of access
- Better informed customers lead to less re-work
- Smoothing of business peaks

Becoming an employer of choice:

- Recruitment of quality staff
- Retention of staff
- Reduction in recruitment and training costs due to less wastage
- Improvement of profile in community

Making better use of IT or accommodation:

- Lower unit costs
- More money for existing services

### **The challenges**

#### **Partnership working**

1. Tensions (regional and local) (unions and management)
2. Right people on the project board
3. People resorting to set piece management/union confrontation
4. Setting realistic timeframes

#### **Tips**

1. Take time at the start to talk to partners
2. Ensure each person can contribute
3. Examine issues that might give each side a problem
4. Start with quick wins.

### **Planning and control**

1. Role conflict on project board
2. Different views on project management
3. being too inflexible with your plan
4. Misjudging resources – When? How long? Who? What?

### **Tips**

1. Ensure project members appreciate holistic nature of work-life balance
2. Appoint a project manager
3. Be open to creative thinking and new ideas. Test these.
4. Review milestones and timescales at each meeting.

### **Funding**

1. Getting this right at the start or you will lose valuable time!
2. Get promises of funds in writing
3. Financial Propriety rules
4. Problems in tracking progress

### **Tips**

1. Appoint someone to be accountable and set clear guidelines
2. Be clear about any conditions
3. Explore flexibility of each partner's funding and use the more flexible for innovative expenditure.
4. Set in place clear audit trails and monitor budget

### **In practice**

Julie is an employee in the Inland Revenue Corporate Services in South East England. She is married with twin girls aged six. She collected flexi credits toward time off for childcare by working Saturday mornings.

Julie wanted to find a way to spend more time with her children over the summer holidays. By working one Saturday per month as a receptionist in the Inland Revenue's enquiry centre, she is able to bank "flexi credits" towards time off in August. Time banking means she was able to collect flexi credits greater than the current 18 hour maximum.

Julie says: "I haven't got any childcare problems this summer, and I won't have to pay a childminder."

Benefits to Inland Revenue: The Inland Revenue can extend its opening hours and provide a face-to-face customer service on Saturday. Julie is a happier employee and as such her productivity and quality of work have improved.

Des is an employee in the Inland Revenue's Risk and Intelligence Analysis Service in Brighton. He commutes to work from Burgess Hill everyday by bus. He compressed his working fortnight to reduce travel time.

Des looked at the flexible working options on offer and decided to try a compressed working fortnight. This involved working 74 hours in nine days leaving the 10th day free. Or to put it another way, an additional 24 days off on top of his annual leave.

Des says: "I save about an hour and a half in travelling time. I have more time to be at home, go shopping, watch films, potter in the garden or go away for long weekends."

Benefit to Inland Revenue: Des has proved that he can still deliver results for the Inland Revenue whilst increasing work-life balance.

**The future**

The OurTime pack has been adopted by a number of companies as template for introducing flexible working in their organisation.

The OurTime website [www.pcs.org.uk/ourtime](http://www.pcs.org.uk/ourtime) includes useful resources and a step by step guide to how a partnership model was developed.