

A year at a time:

the annualised librarian

A front-page story in *Library + Information Gazette*¹ revealed that Britain is dragging its feet in relation to the introduction of flexible working arrangements. The Equal Opportunities Commission story *Enter the Timelords*² cited in the report shows that flexitime is only available in less than half of UK companies and organisations, compared to nearly 90 per cent of German and Swedish companies.

Back in 2004, Kingston University Library Services was undergoing a restructuring process that led us to examine our working arrangements. We wanted to provide staff with flexibility while delivering a customer-focused service across an extended opening operation in our four learning resources centres.

A consultation document, *The Future of Library Services*,³ provided the basis for debate in our teams on how to structure our staffing to achieve the desired service model. During these discussions the concept of 'annualised hours' was advocated by some of our part-time staff who had recognised the benefits and had been trying it out as a small group for a couple of years. This stimulated interest among full-time staff and led to the senior team researching annualised hours schemes and assessing the feasibility of implementing such a scheme across the department.

Unlike flexitime schemes, which tend to calculate hours on a monthly basis, the annualised hours model looks across the entire year. At Kingston University full-time staff work a 37-hour week and typically receive 25 days' annual leave plus the statutory Bank Holidays. So annualised hours would be calculated as follows:

37 hours worked across 5 days	= 7.4 hours per day
37 hours x 52 weeks	= 1,924 hours
25 days' annual leave x 7.4 hours	= 185 hours
8 Bank Holidays x 7.4 hours	= 59.2 hours
Total leave	= 244.2 hours
Total hours to be worked in a year	= 1,924 - 244.2
	= 1,679.8 hours

Each member of staff then agrees a working pattern with their team leader to enable them to fulfil that commitment.

We soon realised that this would dramatically simplify our existing contractual



Flexitime schemes tend to calculate hours on a monthly basis, whereas annualised hours looks across an entire year.

Elizabeth Malone describes how flexible working at the deep end can benefit your service, and how both staff and management concerns at this initially daunting approach can be met.


arrangements. By 2004 we were aiming to have an established staffing of 90 full-time equivalent (FTE) posts. This meant some 120 actual people, about half of whom would be on some sort of part-time contract (ranging from as much as 0.9FTE, down to just 0.2FTE). Many of the very fractional posts were the result of a gradual increase in opening hours. We had staff who had contracts to work only on Saturdays, or Sundays, or Friday evenings between 5pm and 9pm. Some staff had term-time-only contracts, while others had term-time-only, middle-of-the-day hours to provide extra cover over the busy lunchtime period. Inevitably, some part-time staff also held more than one contract.

As if this wasn't complicated enough, even our full-time staff didn't work the straightforward university 37-hour week. To accom-

modate evening working, full-time staff were working 37.5 hours during vacations and 38.5 hours during term time, all or which added up to the equivalent of an additional eight days across the year known as 'vac days' which were then added on to annual leave. Full-time staff also received time-and-a-half off in lieu for the hours they worked on a Saturday but, if they volunteered for the Sunday rota, they were paid at double time. On top of all this, two sites had flexitime schemes in place – but not the same scheme!

The part-time staff testing annualised hours had found it far more flexible than simply opting to work term time only, particularly those with pre-school children who didn't yet want to be tied to the school holiday regime. Mutual childcare arrangements had even arisen out of this flexibility. Others pointed out how nice it was not to have to

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Kingston University Library Services

Annualised Hours Scheme

Version 1C, 2nd March 2005

What is an Annualised Hours scheme?

Annualised hours enables staff to vary their patterns of work across each year according to both the needs of the service and individual preference.

The total number of hours to be worked in a year is calculated by the employer, in this case the University, taking into account annual leave and bank holiday allowances.

waste a half or full day's annual leave just to pop along to the school for an hour or so for the carol service, sports day or whatever. This enthusiasm for annualised hours soon won over colleagues and provided the proof of concept that enabled the senior managers to start modelling how the scheme might work for all staff.

Modelling helpdesk staffing

We looked at other sectors where annualised hours schemes were already in operation. An early enquiry to CILIP and an email to Lis-Link failed to provide any examples in a library environment. However, a chance conversation with a friend revealed that a large multi-national software company used annualised hours as a means of staffing its helpdesk and linking together its 'follow-the-sun' model across continents. Research in some of our business databases and on the internet revealed that annualised hours is widely used in the National Health Service.⁴ Although some staff were highly sceptical of management's ability, using the scheme, to staff desks for all the library opening hours, we were reassured by the NHS model: if it worked for a service dealing with life-or-death situations, then it ought to work in a university library.

Our research into annualised hours was only part of the broader restructuring of Library Services which aimed to place all staff in the department within a careers scheme and to provide them with new, updated, broader job descriptions. It was agreed that staff would be compensated for the loss of any overtime payments and/or in lieu hours through a one-off buy-out which they would receive if they signed up to the full package of the careers scheme, job description and annualised hours.

Throughout the research and planning period, staff were very aware that significant changes were on the horizon but didn't know the detail as this had to remain confidential while the proposals progressed through the various approval stages required by the university.

We knew that modelling staffing for our helpdesks was a sensitive issue and that we had to make some assumptions based on the anticipated approval of the other proposals being put forward. Modelling a hurricane is

probably marginally easier than modelling helpdesk staffing across four campuses! We created a likely working pattern for each staff contract bearing in mind that some staff had more than one contract. We experimented with how the week might look if a member of staff worked a shifted week pattern (e.g. Sunday to Thursday), or a nine-day fortnight pattern and so forth. In doing this, it was useful to know we had some vacant posts to lend flexibility to the final scheme. Although the modelling was time-consuming, it was invaluable in highlighting potential limitations of the scheme. One challenge was how to ensure cover for hours outside the university's standard working envelope (8.30am – 5.30pm, Monday – Friday) in a way that was both fair and flexible. Many annualised hours schemes employ a block of 'reserve' or 'floating' hours which can be called upon during unexpected peaks in business. However, we could not see how this concept could be deployed alongside existing university contracts. Instead the requirement for all staff to commit to a quota of non-core working emerged as a solution.

The proposed scheme

The next stage was to draft the scheme. The Head of Learning & Research Support and I worked closely with our departmental administrative officer, whose HR background training proved invaluable in ensuring that we expressed ourselves clearly and related the scheme to the legal framework, such as the Working Time Regulations.⁵ At the back of the booklet we included an FAQs section, trying to anticipate some of the common questions, for example 'What do I do when I have a dentist appointment?' By January 2005 the proposed scheme, along with our broader restructuring proposals, had been approved by the Library Services senior management team and had gone through the approval stages of the university's HR and Finance departments, and the Executive. In March 2005 the scheme was presented to staff as part of the restructuring package, and an intensive period of consultation began.

Out of all the restructuring proposals, it was the annualised hours scheme that produced the most debate. So what did we propose?

- For each member of staff we would calculate the number of hours they had to be in attendance at work across a year.
- Staff would then propose a pattern of work which would be approved by their team leader and be used to create the helpdesk roster.
- Staff would be able to express a preference for a roster block each day when they would guarantee to be on site either already rostered or to be available to cover sickness absence.
- Staff would be committed to working approximately 10 per cent of their hours as non-core time, with a maximum of 13 per cent unless contracted otherwise (for example, on an overnight contract).
- All time would count as single time except Bank Holidays (where it was acknowledged that an incentive for working was required).
- Helpdesk rosters would be published three times per annum so that staff knew their commitments in advance.
- The annual leave year would change from April – March to September – August, thereby avoiding staff struggling to use up remaining leave across the busy Easter vacation.

Advantages of the scheme

- Staff able to adopt a working pattern to suit their personal circumstances.
- Staff would have the opportunity to have longer blocks of time off in quieter periods.
- Timetabled slots would be known in advance to enable staff to plan both work and home life.
- Staff could plan non-desk work more easily, as the roster shape would be known in advance.
- More efficient use of staff time in time-tabling as it would be clear that helpdesk duties take precedence over other commitments.
- The whole Library Services staff would be working to the same scheme of hours

Staff concerns during the consultation period

- Staff able to adopt a working pattern to suit their personal circumstances.
- Was the scheme really as flexible as it sounded?
- How much would staff lose in terms of time off in lieu and overtime payments?
- Difficulty of committing to roster periods so far in advance.
- Would advanced rostering really work?
- How would we stop staff running out of hours?
- How would we ensure staffing cover at certain times, e.g. Friday afternoons?
- How would staff record their hours?
- Would they need to sign on?
- How would managers know if the correct hours had been worked?

These concerns were all valid and the senior staff attended team meetings and discussions with union representatives to explain how the scheme would operate. This was a major period of change for all staff and there was naturally a mix of nervousness, suspicion and concern. We tried to be as reassuring as possible and to answer everyone's questions as they arose. Further sets of operational guidelines and FAQs were published to answer the full range of questions that had arisen during the consultation.

The outcome of these consultations was that by the 1 May 2005 implementation date, 90 per cent of library staff had signed up to the scheme. The challenges that remained were for the LRC managers to put the rostering process into practice and for staff less familiar with Excel to get their heads round the spreadsheet designed for recording hours.

All staff on the scheme submitted their proposed work patterns to their team leaders. Once approved, these were fed into a master spreadsheet to give each of the LRC managers an overall view of staffing at their site. A site calendar was also created in Outlook in which staff could enter meetings and other appointments. Both of these tools were vital to those creating the helpdesk rosters. To help LRC managers further, the senior team looked at minimum staffing guidelines for each LRC, which also helped to provide a framework for team leaders in agreeing work patterns.

It was interesting to see that, even early on, we received some quite creative and unusual work patterns, proving that our staff appreciated the flexibility on offer. However, the majority of staff opted for, and have continued with, relatively conventional patterns. Submitting work patterns also gave staff, and particularly team leaders, greater responsibility for planning their work and scheduling team and office cover, rather than everyone just relying on the timetable. Team leaders, rather than site managers, were given the responsibility of ensuring that their staff worked the required hours. This was done with a very light touch, with staff simply being asked to submit their spreadsheets on a termly basis for review. However, the scheme made clear that managers did reserve the right to review a member of staff's hours sheet at anytime.

One manager appointed after the scheme was introduced was surprised at the amount of trust placed in staff to record their hours, but he is not aware of any abuse.

On the downside, producing rosters of helpdesk cover in advance proved almost impossible. I don't believe that Kingston is unique as a university in having a meetings culture. Although we could roster around our own regular team meetings, the numerous last-minute requests (received, for example, by subject specialists to attend faculty and school meetings) meant that the roster was constantly being revised. We considered making each team responsible for finding cover but the major problem with this was Wednesday afternoons when entire teams could be missing at meetings. After giving the advanced roster a fair trial, the LRC managers decided to return to the weekly roster / timetable for Monday to Friday working. However, they have been able to keep advanced rostering for weekends, and staff are more willing to come forward to work Bank Holidays to fulfil their non-core quota. LRC managers have indicated that having a non-core quota has been very important in ensuring full cover across staffed hours.

Abandoning the weekday advance roster has been a small price to pay compared to the overall gains for the service in working annualised hours. All library staff are now employed on the same contract. Even staff recruited to work our extended opening shifts (8.30pm till 8.30am), to cover 24-hour opening, can be signed up to the scheme. This has reduced considerably the amount of administrative time spent dealing with different contracts. Staff find it easy to record their hours on the spreadsheet, which does much of the adding up for them and also enables them to predict their hours for the year. I am not aware of there being any disputes over hours and timesheets, and far less time is spent debating how long it takes to open the LRC of a morning and what time can be claimed back. All time worked is simply recorded and staff accept that the

vagaries of traffic jams and public transport can affect their hours but that equally they gain when a long meeting or complicated enquiry detains them beyond their usual finishing time. One of our LRC managers appointed after the scheme was introduced has remarked that initially he was surprised at the amount of trust placed in staff to record their hours but, in practice, he is not aware of any abuse of the system.

The scheme is now embedded into our working lives, and the initial concerns and wariness have gone.

'After initially resisting the idea, I have been able to adapt my hours into a pattern that fits more comfortably around my family life. I have been able to shift my working day so that I can get to work before traffic builds up, park before the car park fills up and leave before the rush hour gets fully under way.'

Member of staff

Feedback about the scheme from all the LRC managers has been positive, demonstrating that it is possible to allow staff greater flexibility in working while meeting the demands of the service.

So where next for annualised hours at Kingston? Our scheme needs updating, as two years of custom and practice have tweaked it from its original edition. On 1 August 2006 Library Services and ICT Services converged to become a single, integrated department of Information Services. Inevitably this has led to further restructuring and, as yet, we have not tackled the issue of whether our ICT colleagues should join the scheme. As with Library Services, the old ICT Services department had its contractual and overtime quirks, so we would need to reconsider the scheme carefully to shape it to meet the requirements of a much broader service. However, I believe it would be worthwhile so we could offer our ICT colleagues the option to enjoy the same flexible working practice. ☆

References

- 1 Tim Buckley Owen. 'Getting the balance right'. *Library + Information Gazette*, 29 June-12 July 2007, p. 1.
- 2 *Enter the Timelords*. Equal Opportunities Commission.
- 3 Graham Bulpitt. *The Future of Library Services*. Kingston University, 2004.
- 4 Department of Health. *Working Lives: Programmes for Change - Annual Hours*.
- 5 *Working Time Regulations: a detailed guide* (revised October 2006). Department for Employment & Learning, 2006.

Year:	2006-07	1st September 2006 - 31st August 2007	Non-core as a % of hours worked to date	#DIV/0!									
Non-core as a % of total hours to be worked	0.00%												
Weekly Total	0							Running Total	0	Non-core for week	0	Non-core running total	0
28th Aug													
4th Sep													
11th Sep													
18th Sep													
25th Sep													
2nd Oct													
9th Oct													
16th Oct													
23rd Oct													
30th Oct													
6th Nov													
13th Nov													
20th Nov													
27th Nov													
4th Dec													

Annualised hours spreadsheet

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