

ASSESSMENT TOOL

Assessment of enterprises WLB

This tool enables to pinpoint the current level of implementation of WLB measures and policies in the enterprise. Aspects and indicators, both inside and outside of the enterprise, are taken into account according to their degree of intensity and pervasiveness in relation to existing measures, attributing values on a scale (from 1 – lack of reconciliation practices – to 4 – WLB practices are integrated in the strategical decisions of the enterprise).

The assessment has to be conducted at the onset of the project and the total sum of the points of the single indicators illustrates the initial degree of compliance to the WLB criteria.

The toolkit provides indications and implement to improve the level of “response” to WLB which the enterprise may then enforce; the welfare manager may be a strong support to this end.

The self- assessment should be conducted again one year later.

Internal indicators

Indicators	Lack of practices	Initial state	Ad-hoc practices	Strategy
Existing practices on facilitation of working hours: - Staggered/condensed hours - Hours bank - Part time - Job sharing - Shifts - Remote working - Smart working -	No measures on formal nor informal level	Existing informal practices on facilitation of working hours	At least one practice has been formalized	2 or more practices have been formalized, including remote or smart working for those roles which it can be adapted to.
	1	2	3	4
Existing incentives (financial/organizational) for periods of suspended working activity: - Integration statutory maternity leave (es. 1 additional month and/or integration of the allowance)	The enterprise assesses mandatory measures with regards to suspension of working activity	The enterprise lays out one additional measure to the mandatory ones	The enterprise implements at least 2 ameliorative practices (financial and organizational PoV) on the issue of the suspension of working activity	The enterprise promotes 2 or more additional practices in support to the suspension of working activity as well as raising awareness among employees through informative activities in the workplace.



<ul style="list-style-type: none"> - Integration planned paternity leave (5 days) - Allowance and/or “flexible” rules for family leave - Allowance and/or “flexible” rules for study leave - Formation and retraining programs after prolonged leave 	1	2	3	4
<p>Measures to support employees with regards to care load:</p> <ul style="list-style-type: none"> - Direct offer or through vouchers for educational services or agreements with specialized structures (nurseries, play centres, babysitters, day care or summer camps, etc.) - Youth orientation services - Services for the elderly or for people with disabilities - Services of support to the caregiver - Option to bring the children to the workplace once in a while - 	No existing measure on “facilitation” of care work	Only one convention with sparse care services	Several existing options (discounts, vouchers.) to choose among as a support to care load.	A diversified offer of services provided by the enterprise as well as a welfare manager (on appointment or in a set time or place) for a better approach to meeting one’s own needs.
<p>Promoting services to enhance the possibility of employees’ time saving:</p> <ul style="list-style-type: none"> - Corporate concierge (utility room – ironing, laundry...) paperwork handling, examinations booking...) 	Not existing agreement and no service provided by the enterprise	Informal time-saving practices (e.g. possibility to receive on-line shopping etc....)	Enterprise implemented some time-saving practices but those are not part of an overall planning	Existing welfare plan includes time-saving actions and services
<ul style="list-style-type: none"> - Cleaning and maintenance services 	1	2	3	4



- On-line shopping to be delivered to the workplace -				
Promoting and incentives (support) to employers well-being in the workplace: - In-company psychologist or counsellor - Mentoring for career path - Training - Strengthening of key skills/knowledge -	Lack of specific in-company practices for employees' well-being	Inconsistent practices for promotion of in-company employees well-being (e.g. induction activities on business climate)	Enterprise implemented some practices to improve employees' well-being in the workplace but those are not part of an overall planning	Existing structured welfare plan including actions and services to promote employees' well-being in the workplace
	1	2	3	4
Creating and raising awareness on WLB issues in the workplace: - Raising awareness on WLB/diversity, etc. - Organization of a "family day" in the workplace - Support to informal local networks (e.g. walking school bus organization, support for transportation, buyers' group) -	WLB is not within the scope of the enterprise	Occasional practices to promote WLB	The enterprise plans actions and events for promoting WLB but those are not included in an overall planning	Several events and services in the enterprise and participation to competitions/awards (SMEs welfare index, family audit certification, etc.)
	1	2	3	4



External indicators

Indicators	Lack of practices	Initial state	Ad-hoc practices	Strategy
Accessibility - The workplace is in a location which is easily reachable	The workplace can be reached only by car	The workplace is reachable also with one public transport even though the time it takes wouldn't make it a real viable choice	The workplace is easy to reach with public transportation	The workplace location is easily accessible, and the enterprise provides bus passes/shuttles or promotes car-sharing.
	1	2	3	4
Connections - The enterprise is located in a place where there are other enterprises to build a dialogue and collaborate around WLB	The enterprise is in a location where there are no other enterprises	In the area there are few enterprises.	Enterprises on the ground exchange good practices about WLB	Enterprises in the area are already part of a network and they have already started integrated projects about WLB and employees' benefits
	1	2	3	4
The enterprise is conveniently located in respect to services	Enterprise is located in an isolated area or there are no services nearby	Enterprise is located in an area where there are very few services but no possibility of choosing.	Enterprise is located in an area where there are some services (cultural, free time, education...) and more services are in progress	Enterprise is located in area where there are different types of services well-integrated in the local socio-economic fabric: from services for children and teenagers, to public transport, free time services, etc. Everything is close at hand and is easy-to use
	1	2	3	4

Points

- Up to 11 – Level 1
- From 12 to 22 – Level 2
- From 23 to 29 – Level 3
- From 30 to 36 – Level 4

- Level 1 - hibernating

A WLB program would be advised, starting from involving employees (focus group, survey...), raising awareness on the issue and implement some basic actions;



- Level 2 - awakening

Something is moving but there is still a long way to go. Determine some viable action on the basis of the indicators (at least 2) where the enterprise has a low score;

- Level 3 - active

The enterprise adopts policies and actions to promote WLB. It would be advised to tackle the indicator with the lowest score with tailored actions. Raising awareness and propagating WLB culture (and corresponding actions) among all employees;

- Level 4 - expert

The enterprise adopts WLB policies and actions. It could increase compliance through actions involving the whole area and creating networks with other enterprises.



[Level 1 or 2 tool]

The tool may be considered one of the essential basic-tools to detect reconciliation needs for employers in an enterprise which has just started approaching WLB (e-g enterprises which scored 1 or 2 on the previous assessment)].

It's suitable tool for a first analysis and it could provide a first selection of employees WLB needs. Outcomes may be the starting point for the enterprise to undertake actions/make proposals for reconciliation/employees' benefits

**FAMILY-LIFE TIME
 AND WORKING TIME**

PERSONAL RECORDS OF THE INTERVIEWEES

SEX
M
F
AGE
15-25 years old
26-35 years old
36-45 years old
46-55 years old
56+ years old

Employment contract

EMPLOYMENT CONTRACT
Open-ended contract
Fixed-term contract
On-the-job training contract
Atypical
Self-employed
Other



WORKING HOURS
Full-time
Part-time
Flexible full-time
Flexible part-time
WHY PART-TIME?
Child and family members care
Organization
Personal reasons

IN NEED OF MORE TIME TO TAKE CARE OF

1) MINOR CHILDREN
Very
Enough
A little
Not at all
2) ELDERLY
Very
Enough
A little
Not at all
3) PEOPLE WITH DISABILITIES
Very
Enough
A little
Not at All



4) FAMILY
Very
Enough
A little
Not at all
5) SELF-CARE
Very
Enough
A little
Not at all
6) OTHER ACTIVITIES
Very
Enough
A little
Not at all

WORK – LIFE RECONCILIATION. THE ROLE OF THE ENTERPRISE

ARE YOU SATISFIED ON HOW YOU CAN RECONCILE WORK AND FAMILY TIME?
Very
Enough
A little
Not at all



ARE YOU SATISFIED OF THE ACTIONS UNDERTAKEN BY YOUR ENTERPRISE?

Maximizing of time and working space

Very

Enough

A little

Not at all

Please specify what are the implemented practices and the level of satisfaction

Part-time (very – enough – a little – not at all)

Flexible hours (entry/exit – lunch break – working time modules – rearrangement of working hours)
(very – enough – a little – not at all)

Job sharing (very – enough – a little – not at all)

Remote working (very – enough – a little – not at all)

Smart working (very – enough – a little – not at all)

Hours bank (very – enough – a little – not at all)

Solve specific and personal needs of employees through support to care obligations:

Very

Enough

A little

Not at all

Please specify what are the implemented practices and the level of satisfaction

Additional leaves (very – enough – a little – not at all)

Leave (very – enough – a little – not at all)

Support services for children and teenagers care (very – enough – a little – not at all)

Orientation (very – enough – a little – not at all)

Support services to the elderly (very – enough – a little – not at all)

Support services to people with disabilities (very – enough – a little – not at all)



Increase the free time

Very

Enough

A little

Not at all

Please specify what are the implemented practices and the level of satisfaction

Laundry-ironing service with delivery to the workplace (very – enough – a little – not at all)

in-company paperwork and errands handling services (e.g. examination and medical checks bookings) (very – enough – a little – not at all)

On-line shopping with delivery to the workplace, or take away service (very – enough – a little – not at all)

Internal delivery service for personal paperwork (very – enough – a little – not at all)

Cleaning and maintenance services (plumbers, painter, mover, green spaces caretaker, etc.) (very – enough – a little – not at all)

Promote welfare operations and ties with the workplace

Very

Enough

A little

Not at all

Please specify what are the implemented practices and the level of satisfaction

In-company consultancy and counselling services (very – enough – a little – not at all)

Mentoring and coaching for the career path (very – enough – a little – not at all)

Award systems (very – enough – a little – not at all)

Training (very – enough – a little – not at all)

Actions for keeping people with a prolonged absence from work connected to the workplace (very – enough – a little – not at all)

Work shadowing opportunities (very – enough – a little – not at all)



[Level 2 or 3 tool]

The following tool is to be adopted by enterprises which scored 2 or 3 on the reconciliation assessment. It is suitable for enterprises which are beginning to consider reconciliation or already implemented some more or less structured form of employees' benefits.

The tool detects the extent up to which the existing organizational structures and employees benefit/reconciliation practices are rooted in the enterprise to draft an overall framework on the most used activities/organizational models. This is aimed at implementing new actions/policies or extending the existing ones based on employees preferences/needs (it is advised to tailor the following survey to existing practices/activities used by employees and/or on the base of the possibility to implement them in the future).

USING WLB TOOLS

Number of employees availing themselves of at least 1 WLB measure/total employees

Maximizing of time and working space

Part-time

- ≤10%
- 11%-30%
- 31%-50%
- 51%-70%
- ≥70%

Flexible hours (entry/exit – lunch break – working time modules – rearrangement of working hours)

- ≤10%
- 11%-30%
- 31%-50%
- 51%-70%
- ≥70%

Job sharing

- ≤10%
- 11%-30%
- 31%-50%
- 51%-70%
- ≥70%



Remote working

- ≤10%
- 11%-30%
- 31%-50%
- 51%-70%
- ≥70%

Smart working

- ≤10%
- 11%-30%
- 31%-50%
- 51%-70%
- ≥70%

Hours bank

- ≤10%
- 11%-30%
- 31%-50%
- 51%-70%
- ≥70%

Solve specific and personal needs of employees through support to care obligations:

Additional leave

- ≤10%
- 11%-30%
- 31%-50%
- 51%-70%
- ≥70%

Leave

- ≤10%
- 11%-30%
- 31%-50%
- 51%-70%
- ≥70%



Support services for children and teenagers care

- ≤10%
- 11%-30%
- 31%-50%
- 51%-70%
- ≥70%

Orientation

- ≤10%
- 11%-30%
- 31%-50%
- 51%-70%
- ≥70%

Support services to the elderly

- ≤10%
- 11%-30%
- 31%-50%
- 51%-70%
- ≥70%

Support services to people with disabilities

- ≤10%
- 11%-30%
- 31%-50%
- 51%-70%
- ≥70%

Increase free time

Laundry-ironing service with delivery to the workplace

- ≤10%
- 11%-30%
- 31%-50%
- 51%-70%
- ≥70%



in-company paperwork and errands handling services (e.g. examination and medical checks bookings)

- ≤10%
- 11%-30%
- 31%-50%
- 51%-70%
- ≥70%

On-line shopping with delivery to the workplace, or take away service

- ≤10%
- 11%-30%
- 31%-50%
- 51%-70%
- ≥70%

Internal delivery service for personal paperwork

- ≤10%
- 11%-30%
- 31%-50%
- 51%-70%
- ≥70%

Cleaning and maintenance services (plumbers, painter, mover, green spaces caretaker, etc.)

- ≤10%
- 11%-30%
- 31%-50%
- 51%-70%
- ≥70%

Promote welfare operations and ties with the workplace

Consultancy and counselling services

- ≤10%
- 11%-30%
- 31%-50%
- 51%-70%
- ≥70%



Career path mentoring and coaching

- ≤10%
- 11%-30%
- 31%-50%
- 51%-70%
- ≥70%

Award systems

- ≤10%
- 11%-30%
- 31%-50%
- 51%-70%
- ≥70%

Training

- ≤10%
- 11%-30%
- 31%-50%
- 51%-70%
- ≥70%

Actions for keeping people with a prolonged absence from work connected to the workplace

- ≤10%
- 11%-30%
- 31%-50%
- 51%-70%
- ≥70%

Work shadowing opportunities

- ≤10%
- 11%-30%
- 31%-50%
- 51%-70%
- ≥70%



[Level 3 or 4 tool]

The tool assesses the level of effectiveness of reconciliation practices/employees benefits on the enterprise level (employees' satisfaction, productivity, etc.). The analysis is based on a first check of indicators at T0 and a subsequent check at T1, taking into account a 1-2 years frame for WLB measures to be active before the second check.

It is suitable for expert enterprises (which in the assessment phase scored 3 or 4) and which integrated WLB practices in their long-term plans and investments.

WLB MEASURES SUCCESS

Checking the increase in the use and satisfaction with regards to WLB measures in comparison to corporate well-being and productivity from T0 to T1

Indicator 1

Increase in the use of WLB measures

% Use WLB measures T0/% Use WLB measures T1 (number of employees availing themselves of at least 1 WLB measure/total employees

(analysis of the WLB measures usage % pertaining to each of the 4 goals T0/% Use of specific WLB measures T1)

Indicator 2

Increase satisfaction with regards to WLB measures

% satisfaction WLB measures T0/% satisfaction WLB measures T1

(analysis of the WLB measures satisfaction % pertaining to each of the 4 goals T0/% satisfaction specific WLB measures T1)

Indicator 3

Decrease in the absenteeism rate

Days of absence/number of employees T0

Days of absence/number of employees T1

Indicator 4

Decrease in the staff turnover rate

Number of employees who quit their job/ average number of employees in the year X T0

Number of employees who quit their job/ average number of employees in the year X T1

Indicator 5

Increase in the productivity rate

Value of productivity/number of employees T0

value of productivity/number of employees T1

