

A Guide for Representatives: How to Represent People Working from Home



About the IPA

The IPA exists to promote the involvement and participation of employees in their places of work, and through doing so improve the quality of working lives. The IPA is Britain's leading organisation delivering partnership, consultation and employee engagement in the workplace.

Through our research and practice we develop new ways of working, based on trust and collaboration that deliver better workplaces and better outcomes – employee wellbeing, increased productivity and improved services.

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Foreword by Susan Clews

Working life in UK has been transformed by the Covid 19 pandemic. One of the biggest changes has been the huge growth in homeworking with almost half of all workers now doing some work from home. Although many of these workers will eventually return to their offices and other places of work, extensive homeworking looks likely to be a permanent feature of the employment landscape. This new guidance from the IPA on representing people working from home could not therefore be more timely.

We know that employee voice and consultation can play a major role in improving organisational effectiveness and productivity. But perhaps just as important is the role they can play in building trust and confidence in organisations and their leaders. The Covid 19 pandemic has understandably left many workers concerned about their futures and worried that their organisations may not have their best interests at heart. To avoid a damaging 'us and them' mindset developing going forward it is therefore essential we provide everyone, including those working from home, with the opportunity to express their views and have these seriously considered by management.

As we move on from the Covid 19 pandemic we have the opportunity to change working life for the better. However, to make this a reality we must have effective employee voice mechanisms, something this guide can help us achieve.

Acas welcomes this contribution, and we look forward to the promoting this agenda in partnership with the IPA.



Susan Clews
Chief Executive of Acas

Introduction

One of the more positive consequences of the 2020 Covid-19 lockdown was the re-evaluation of jobs that previously were not considered suitable for home working. For example, Lloyds Banking Group, in an acceleration of their future ways of working plans, went from 15,000 regular home-workers to 50,000 almost overnight, shipping 20,000 laptops and 25,000 other office items to newly home-based employees. With the use of technology, many organisations moved quickly to keep the lines open to their customers and staff generally responded well to the challenges.

Organisations that received the best response from staff were those that recognised the need to support employees to balance work and home life. In the example of Lloyds, 75% of employees reported that they felt supported to balance work and home life. As the UK emerges from the pandemic, organisations are hoping to hold on to the positive changes accelerated by lockdown at the same time as taking the opportunity to save costs by reducing office space and introducing more home-working or hybrid-working – working from home combined with office-based hot-desking. BP, for example, announced plans for what could be a radical reduction in their office space. There is much for individual employees to consider – some may miss the camaraderie and social interaction of the workplace and be eager to get back to working with their teams, while others may be relishing the time and money saved by avoiding the daily commute.

Organisations will need to carefully consider whether they can continue with workplace policies that apply to everyone regardless of circumstances, or whether they should develop a more individual approach to achieving business objectives balanced with employee's preferences and needs. This consideration will need to take into account broader issues beyond productivity metrics and savings on office space, to ensure no individual or group of employees are disadvantaged in this "new normal". Younger employees who are more likely to live at home or in shared accommodation may find it more difficult to find a quiet, suitable place to work or have uninterrupted access to high speed broadband. Those living alone, may feel more isolated by the lack of personal interaction in the workplace. Reports of increased incidents of domestic abuse during the Covid-19 lockdown also remind us that home is not a safe space for everyone. There are challenges for organisations and their employee representatives serving on Employee Forums to effectively listen to both the collective and individual employee voice.

Typically the role of employee representatives on an Employee Forum is to receive strategic information from the organisation and respond with an accurate assessment of employee reactions to any proposed changes, as well as raising and discussing alternative ways of meeting the objective that has been set out. They play a critical role in helping employees to become more informed about the organisation and its strategic direction, as well as contributing to joint problem-solving with management. The key issue now is how do employee representatives continue to articulate the collective voice of employees whilst at the same ensuring that individual issues, which may become more prevalent alongside the roll-out of home or hybrid working, are properly addressed at the right level of the organisation.

Representing Remote Workers

How Might Staff Be Coping?

As we considered in the introduction, working remotely can present different challenges to employees:

- Lack of face-to-face supervision – some employees may enjoy the additional autonomy, others may find reduced access to their supervisor, team leader or line manager to ask for advice or answer questions makes their job more stressful.
- Lack of access to information – ensuring equal and timely access to information about the organisation's strategy and policies, particularly in a rapidly changing working environment, is always a challenge for organisations. Some employees may not be able to access information on an intranet because they don't have the right equipment, others may be at the end of an information cascade that leaves them feeling they are the last to know.

"We have been fully involved in shaping regular communications to all staff and our input has been recognised by senior managers. These senior managers have also involved us at an early stage in their return to the office strategy and have acknowledged how important the different perspectives we provided to them have been, particularly in assessing risks and keeping people informed effectively." Employee representative in a large housing association.

- Social isolation – a particular issue for employees who live alone, but also for younger employees who may base their social life around their work colleagues. The sudden removal of social interaction within the workplace can be detrimental to mental wellbeing.
- Home-schooling, childcare and eldercare – some employees may be juggling these responsibilities with work, and whilst working from home can sometimes help by reducing time spent outside the home it can also mean for some that there is no respite from caring responsibilities. Many report that the daily commute is usually their "me time".
- Home is not always a safe space – when employees request a return to the workplace, they should be allowed to do so without having to give a reason.
- Line managers and supervisors are themselves grappling with this new way of working – where working from home has been rapidly rolled out, leaders are faced with quickly adapting their management style to the new needs of the individuals in their team. Where the change has been rapid, training and development for line managers may not yet have caught up with the new way of working, putting additional pressure on both leaders and their teams. Some employees have reported "management by metrics" whilst they have been working from home and the additional stress of needing to meet targets that don't take into consideration home-schooling commitments or an insecure internet connection.

"Some workers are missing their colleagues and are quite fed up at home. It is more difficult to help them remotely especially when line managers are forgetting to consult about changes that will affect them.... the majority of individual issues are being caused by an understandable lack of experience in dealing with these bizarre circumstances. We just have to be vigilant and keep in contact with managers to offer our assistance to them." Trade union representative in a public sector organisation

- Lack of space – finding a comfortable quiet space to work is problematic for some employees. Ensuring that employees have the proper equipment in order to work safely, such as desks of the correct height and properly supportive chairs, is important to ensure occupational health problems are not being stored up for the future.
- Switching off from the working day – the "always on" work culture already identified as detrimental to mental health may be exacerbated if employees are not able to leave the "office in their living room".

And finally, consideration needs to be given to colleagues who remain in the workplace. Either because their jobs cannot be done from home, perhaps remote access to databases and the information they need is not available, or because other colleagues are shielding at home and they are needed to be in work to cover. In some case these employees may prefer to work from home and are disappointed that this is not available to them when other colleagues are working remotely. It will be important to ensure that a divide between workplace-based and home-based employees does not arise.

Dealing with individual issues

It is likely that many of these will be issues that staff will want to discuss with their employee representatives and there is a danger that representatives could become over involved in individual problems. When that happens, it reduces the representative's ability to offer objective feedback to management concerning the collective views of all employees.

It is recommended that employee representatives refer their constituents to an appropriate management contact if they are raising a personal issue and familiarise themselves with the correct points of contact within the organisation, including mental health first aiders, to help individuals receive the support they need and achieve a resolution.

Nevertheless, employee representatives should make reference to individual issues that may have been raised with them as part of regular anonymous temperature checks back to the senior managers who have formulated the home or remote working policies. These temperature checks should also include feedback from employees who feel more engaged and productive as a result of working from home and are being managed effectively. This balance is critical in order that staff representatives do not put forward a disproportionately negative or positive view of how the working from home policy is really operating.

"Remote working has affected the confidence of line managers, particularly those who tend to manage based on what they observe rather than by productivity. Employees have problems they need to discuss, and some have found that their manager is ill-equipped to handle difficult conversations. Our Forum has raised this as a strategic issue and specific training for line managers is being urgently discussed." Employee representative in financial services.

It is important for all employee representatives to clearly understand their role - what they are there to do and what they are not there to do. In matters that involve colleagues requesting to work from home or wishing to return to the workplace, representatives will need to understand exactly what the organisation's policy is and how that policy is being managed. It will be advantageous for organisations to involve their employee representatives in developing policy in this area, but in situations where the policy is already agreed and being applied, there still needs to be a shared understanding of its objective and how managers are briefed to carry it out. By understanding the strategic intent of the policy, employee representatives will be able to present an accurate temperature check of how it has been implemented, and where improvements might be needed.

"This will be new territory for employers who will hopefully rely on good and accurate feedback for as wide a population of workers as possible. My role is to evidence, deliver and articulate in the strategic narrative the consensus of employees' opinion." Trade union representative in utilities organisation.

Keeping in Contact with Constituents

Employee representatives will often already have the means to keep in contact with their constituents on a regular basis, but it may be necessary to think innovatively about ensuring remote workers are always included. This could include using dedicated pages on the organisation's intranet, online survey tools and virtual "check-in" sessions.

Training provided by IPA equips employee representatives with a "Hot Topics" template to use within their organisation to ensure they connect with everyone including those who are disengaged and those who are highly motivated and enjoy their job. An example template is shown at the end of this section. It is important for employee representatives to present all perspectives both negative and positive. Without knowing where areas of good practice are happening, solutions to problems may exist within the organisation that are not reported. An unbalanced reporting of views may lead to unproductive arguments about a policy that is actually working effectively but is being criticised as unfit for purpose by employee representatives who are only speaking for a small minority.

The "Hot Topics" template

Regarding the "Hot Topics" template, it is important to ensure that representatives are in regular contact with their constituents by asking them four key questions:

- What are the hot topics or main talking points coming out of team meetings or senior manager briefings?
- Have you had any good work experiences recently or stories that would interest other people?
- Do you have any ideas that might make processes or working lives better?
- Are you in regular contact with your line manager and able to discuss any issues that have risen from working from home?

It is inevitable that people will bring up individual issues and problems during conversations with their employee representatives and it may be more of a challenge to draw out the positive stories, but it is always worth doing so in order that examples of good practice are not lost.

The Employee Representative's Checklist

The role of an employee representative is never going to be straightforward but its importance cannot be over-estimated, particularly for people who are working from home or remotely. Here is a summary of what representatives should do:

- 1 Remember that the over-arching purpose of the employee representative's role is to help produce a highly informed workforce and to have the perspective to assess how engaged and motivated the workforce is feeling.
- 2 Represent everyone's viewpoint including the good, the bad and the indifferent.
- 3 Understand why the organisation is doing things in a certain way and get to the heart of what the core objective is.
- 4 Understand how decisions are taken, particularly the different options that were considered and how risks were assessed.
- 5 Keep in regular contact with constituents using the available technology and be persistent in asking them what the "hot topics" are including reference to the specific issues that people working from home might be experiencing if it will draw information out of them.
- 6 If people present individual problems, refer them to their line manager or another appropriate contact who can resolve the issue. If they need support, help them to express their concerns constructively.
- 7 Ensure senior managers are aware of the types of issues that constituents are raising without getting into the detail of individual complaints.
- 8 Ensure senior managers hear the positive stories and ideas for improvement.
- 9 Help senior managers to fill the information gaps to avoid rumours – this is vital for people working from home who may feel isolated from the usual communications channels.
- 10 Have confidence in telling constituents what employee representatives are there to do and not there to do – remembering that employee representatives are genuinely helping people to improve their working experience.

Employee representatives should always feel comfortable asking managers – the HR Team, Line managers or the senior leaders - for assistance if unsure about how to present something. There is no value if the relationship is "them and us" – the key to helping people is always to ensure everyone involved in the employee forum works as a team member.

Additional Tools

The 5 Key Steps to Employee Engagement

This is about creating an informed employee voice.

Some of the challenges faced by organisations that have set up information and consultation arrangements such as employee forums include:

- Why is the agenda full of the basic “tea & toilets” issues?
- Why do representatives bring a wish list of requests from employees?
- Why do so few people stand for election?
- Why are employees disengaged from the process?
- Why are managers unwilling to participate fully?
- Why are employee satisfaction survey results not improved when employees have been given a “voice”?

In these cases, organisations seem to be starting their consultation journey at the wrong place. Here, the agenda is unfocused and is often centred on “hygiene” matters, such as “tea and toilets” and meetings are dominated by trivial issues which would be better raised with line managers who are equipped to deal with them. As a result, senior managers do not see the value of the process and quickly become disenchanted with it.

To have a more positive and strategically minded employee voice, it is necessary to start the journey from a management-driven strategic agenda based on the major changes that are affecting the workplace. In conjunction with this, the process needs employee representatives who are able to understand a strategic agenda and will ask the questions necessary to elicit information on managers’ decision-making rationale.

Only then can organisations take the first of five key steps that will change the employee voice from one which is interested only in trivial or individual issues to one that is informed and interested in their organisation’s strategy.

These five key steps are as follows:

Step 1: Bring employees closer to strategic decisions made by the senior management of the business – “The Strategic Narrative”

It is vital that every employee understands why key strategic decisions are taken and what the thought process has been. This means that strategy has to form the basis of discussions at information and consultation meetings in order that the employee representatives can scrutinise and evaluate management decision-making. This will require them to ask the sorts of questions that the wider workforce will not necessarily think of asking at this stage of the journey. The answers to these questions have to be the foundation of the high-quality communication back to the employees that is essential if the process is going to be successful.

The first job of any representative is to ensure the employees they represent understand the context, enabling them to make sense of why any proposed change is necessary. Employees should, as a result of their representatives asking a series of key questions, be able to trace any change in their own circumstances to a strategic decision. This has the effect of ensuring that employees do not perceive change as something that is done to them, rather than with them.

Step 2: Creating buy-in to the strategic decision.

Buy-in does not necessarily mean employees agreeing with or being happy with organisational change. The basis of employees buying-into a decision that results in organisational change rests with their complete understanding of that decision.

This requires not only an understanding of *why* these decisions have been made but also *how* they have been made. In a mathematics exam, marks are given not just for the final answer, but also for the process by which the answer is reached. Scrutinising senior management's decision making is like that – it is not so much the decision at the end of the process that achieves buy-in, it is management's "showing working".

Essentially, respect for decisions comes when employees understand the process and, equally importantly, the quality of the decision. When managers begin to fully explain to employees their reasons for making a decision, and how the decision was made, trust between managers and employees increase as employees are shown that managers do not have a hidden agenda.

Step 3: the What, the Why and the What Else.

Employees are almost instinctively suspicious about what lies behind major decisions that are taken in their organisation and need reassurance that these decisions have been made with proper consideration.

Only an exploration of the "what else" will overcome this and it is, therefore, imperative that managers talk through the options that they have considered before they reached the final decision. This will, ideally, be done before that final decision has been taken but it can be done retrospectively depending on when the consultation starts. The timing is actually of secondary importance to the quality of the communication that the representatives and managers provide to the employees. It is this regular communication that will lead to Step 4.

The importance of the "what else" cannot be overestimated. Although the rejected options can only be communicated once a final decision has been taken, the realisation that management do, indeed, "think it through" can have a major effect on reducing or eliminating "residual issues" that are caused by the implementation of unpopular change.

Step 4: Continued improvement in employee satisfaction and the building of trust (the working environment).

As organisations move through the preceding three steps, employees will begin to trust their senior managers and the decisions they make. Employees will feel secure in the predictability of knowing they will be involved and that the decision-making process will be open and transparent.

Step 5: Create an informed and credible employee voice with greater perspective in a culture where employees want to contribute and get involved.

If the consultation process properly addresses any cultural problem by following the previous four steps, cynicism and rumour mongering will be reduced. It is within such a fresh, positive culture that employees will be interested in talking about organisational strategy. They will stop speculating about why something has happened and will be more interested in debating what might happen next.

The benefits of this engagement may well be seen in employee surveys. More employees will also want to stand as representatives as the role is proved to have real value and influence in the organisation and as more people become aware of the role as a result of better communication.

Perhaps more importantly, for some individuals it will result in a less cynical attitude and a more positive work experience. A representative might ask themselves if there is anything more significant that they could possibly achieve this than this.

These five key steps reveal why so many organisations have struggled to get employees engaged with an information and consultation process and why so many employees see that process as ineffective. Many have tried to start the process at Step 5 by setting up a simplistic “backwards and forwards” communication between the employees and the representatives with the latter bringing forward the wish lists of the former. This only leads to dissatisfaction and disengagement.

To create the culture or environment where more people want to stand for election to a forum than there are places, the organisation has to work through the key steps in order. There is no short cut. This reduces the importance of “quick wins” but it sharply increases the need to manage the expectations of the employees, particularly in terms of how quickly they will notice the measurable benefits.

The 15 Strategic Questions Representatives Should Share with Senior Managers:

- 1 What was the key trigger for change?
- 2 What is the core business objective?
- 3 What other options did you consider in coming to this decision?
- 4 Why did those options not meet the business objective?
- 5 What happens if we don't do this?
- 6 Have you identified and taken into account all the possible knock-on effects to other areas of the business?
- 7 What did your risk analysis reveal?
- 8 Have you considered the potential effects of disengagement against meeting the core objective?
- 9 When did you first identify the core business objective?
- 10 What is the timeline for the completion of the change process?
- 11 How are we going to measure the success of the change process?
- 12 Over what period of time will we measure that success?
- 13 What is Plan B if this doesn't work?
- 14 How are we going to communicate this consistently and factually?
- 15 What is your strategy to engage with the most affected / upset / resentful colleagues?

Different Uses of the 15 Strategic Questions:

- Use as a communication checklist by reps and managers at strategic level discussions
- A useful management tool – a critical path analysis – for strategic decision-making
- A useful rep tool for building the business case or counterproposals
- A checklist for line managers to review with their senior managers
- A checklist for reps to help colleagues evaluate their ideas

Option-Based Consultation

Those tasked with implementing change will understand the benefits of undertaking a process that means that decisions are understood by the workforce and have some legitimacy. Time taken in consultation can often save time during the implementation phase by removing resistance and gaining valuable feedback on the problems that may arise.

To support organisations to carry out effective consultation IPA developed the Option-Based Consultation model. Option-Based Consultation does exactly what it says. When the need for business change is identified, it is good sense for the managers of an organisation to consider a number of options to meet that need. It is extremely rare that a decision is taken without looking at a number of ways to achieve an objective but, in all cases, there are two: do something or do nothing.

Option-Based Consultation allows employee representatives to influence decision making from the earliest stages, but should this opportunity be missed for some reason, they are still able to influence the implementation. This is not true consultation, but it can still be an effective way of improving communication and, therefore, of implementing change.

The Option-Based Consultation model is focused on the business case. It is about getting the best outcomes when managing change and critically, it is about making sure that decisions, sometimes unpalatable, have legitimacy in the eyes of the workforce. It is rare for employees to be fully informed of the range of options managers have considered before making a decision, and often they feel that managers do not give sufficient thought to how employees will be affected. In a redundancy situation, for example, employees might believe that the redundancies are the business objective itself rather than a consequence of it. Buy-in to any change process is difficult to achieve in such circumstances.

Because it is rare for employees to be involved at an early stage of the decision-making process, there can be the feeling that it is too late to influence the outcome by the time the discussions about implementation start.

Principles of Option-Based Consultation

As soon as a business objective is identified and options to meet that objective have been looked at, consultation with representatives should, begin before one option is selected as the way forward. This, of course, has implications for managers in sharing potentially sensitive information but this establishes everybody's responsibilities right at the beginning of the process. Representatives have to be aware that a single breach of this confidence will lead to trust being undermined. For managers, it is a good opportunity to develop their skills in both the consideration of an issue and their ability to communicate their thought process. Since all this happens before a final decision is made, the representatives' opportunity to influence the outcome can be a real one.

The discipline of stating the business objectives and the thought process involved in developing them is a good one for managers and, if the representatives are concerned by the current options on the table, they can always suggest alternatives. This, in turn, presents the representatives with a greater challenge than merely saying "no" and it is important that they think carefully about any further options that may be more palatable to employees but will still meet the business objective.

At this point in the process there will be a shared understanding of the need for change and the various ways available to make the change. There may not yet be agreement and nor is that necessary, but a clear understanding of why something has to change is fundamental to the success of the process. The representatives should challenge the business case if they do not understand it or agree with it. They should challenge the options presented to them, but management should also challenge the representatives to come up with alternatives. It should produce a healthy, mature and courteous discussion aimed at producing the best decision for the organisation's needs while taking into account the general views and concerns of its employees.

With all of the information about the options and the representatives' accurate temperature check in front of them, management now have the responsibility to make the decision. This process is not about removing the right of managers to make decisions; in fact, it firmly establishes this right and responsibility. More importantly, it extends the right of the representatives to having a clear and full understanding of why a decision has been made and why other options were rejected.

This is important for the representatives because, although they will not like every decision that has been taken, they will need to be able to explain the reasons for them with authority to their constituents. This authority must never be underestimated in its contribution to achieving a more open, transparent and trusting culture. In the vast majority of cases, employees will see that an unpopular decision is a last resort.

Communication between representatives and their constituents is an integral part of the consultation process. These representatives will need to establish the "hot topics" amongst the staff on a regular basis in order to provide that accurate temperature check. On occasions this communication might take place very early by means of a genuine canvassing of views and reporting them back. This is more likely to happen at an operational rather than strategic level. More usually, the consultation process will require total confidentiality until an announcement, or a joint announcement is made.

Best practice strongly suggests that the options under consideration should always be confidential at a strategic level until the final decision is communicated, as premature discussion with employees can lead to a great deal of confusion and disengagement. For example, employees may get the impression they are voting on strategic decisions – cynicism can develop if the option they thought they were voting for was not the one that was finally implemented.

All parties have a shared interest in making sure communication is delivered well. Discussing the communication process as part of the consultation will achieve this and it is particularly helpful in ensuring that neither party surprises the other with what they say and when they say it.

Benefits of Option-Based Consultation

Option-Based Consultation will also achieve real business benefits in terms of better decision making and removing the gap between decision makers and those affected by their actions. It can work equally well in a unionised or non-unionised environment provided the representatives and managers are fully trained in the skills and behaviours necessary to make the process work properly. Option-based consultation will give representatives greater ability to influence by intellect and reason than they might have by simply using power. It should also make managers more comfortable in engaging in the consultation process earlier.

A key benefit of Option-Based Consultation is greater awareness among employees of the thorough process of management decision making which leads to greater acceptance of the quality of the decision being implemented even if the change is unpopular. Moreover, the development of a consultative culture and improved communication of the organisation's strategic agenda can support better employee engagement through the development of employee voice and a line of sight between organisational strategy and employees' day to day work.

Perhaps the key benefit of Option-Based Consultation is the removal of residual issues, complaints and general disengagement of staff when change is implemented. Much of this occurs when employees do not understand why change has happened or how well the decisions have been thought through. In these circumstances, employees tend to default to negative thinking.

Option-Based Consultation will fill the knowledge gaps and create an informed workforce more likely to embrace change. This can happen when the model is used prospectively or retrospectively allowing greater flexibility for managers than the standard definitions of consultation suggest.



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