

**HOW DO OLDER WORKERS IN THE FIRE & RESCUE SERVICE  
DEAL WITH WORK LIFE BALANCE ISSUES  
AS THEY PLAN FOR, APPROACH, AND TRANSITION THROUGH  
RETIREMENT?**

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## ABSTRACT

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### **How do Older Workers in the Fire & Rescue Service deal with Work Life Balance issues as they plan for, approach, and transition through Retirement?**

How can older workers in the public sector maintain a satisfactory work life balance in the last ten or fifteen years of their career and into retirement? Organisational policies designed to support work life balance may help, but only if there is a corporate will to overcome prevailing internal culture, together with an understanding of the specific needs of older workers.

Work life balance, which has gained importance over the past few decades, is defined here as the way in which individuals apportion time spent in their paid work with all of the other activities in their lives. Those approaching the end of their working lives come from a workaholic generation used to long hours as a way of showing loyalty to their employers, whereas their younger colleagues expect good work life balance as the norm. While the notion of work life balance for those who are no longer in paid work may seem strange, the way an individual plans for and controls the manner of their retirement may impact their well-being both before and after retirement. For many, retirement is no longer a single step from employment into non-employment; rather a phased reduction or sometimes ‘un-retirement’ and these changes may affect individual perceptions of their work life balance.

This qualitative study, with uniformed and non-uniformed staff aged 45+ employed by a metropolitan Fire & Rescue Service, enabled participants to consider their work life balance issues; particularly whether there were any issues that were specific to that age cohort; and whether those issues might change as they moved towards and through retirement, although few had made detailed plans about their post-retirement lives. The effectiveness of organisational work life balance policies was found to be subject to the prevailing culture as well as pressures on the public sector to reduce staffing levels while maintaining front line services. The effects of the abolition of the Default Retirement Age and changes in the pension schemes have yet to be fully addressed by the organisation or individual employees.

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## **ABBREVIATIONS**

BERR	Department for Business Enterprise & Regulatory Reform
CFO	Chief Fire Officer
CIPD	Chartered Institute for Personnel and Development
DCLG	Department for Communities and Local Government
EEC	European Economic Community
EU	European Union
FRS	Fire & Rescue Service(s)
NWFS	Networking Women in the Fire Service
WMFS	West Midlands Fire Service

# **Chapter 1**

## **Introduction & Background**

**How do older workers in the Fire & Rescue Service deal with work life balance issues as they plan for, approach and transition through retirement?**

In researching this question, a series of additional questions arose. For example, do older workers have any work life balance issues at all? And if so, are those issues specific to their age cohort or are they more generally encountered by all age groups? If older workers are dealing with work life balance issues, does the approach and transition through retirement (and for some un-retirement or re-employment) have an impact? Does planning for retirement, and having some control over the manner of retirement, improve work life balance in the final few years of employment? And how does the organisational culture of the Fire & Rescue Service affect the work life balance of its older workers?

Work life balance, which has gained importance over the past few decades, is defined here as the way in which individuals apportion time spent in their paid work with all of the other activities in their lives. Those approaching the end of their working lives come from a workaholic generation used to long hours as a way of showing loyalty to their employers, whereas their younger colleagues expect good work life balance as the norm, often as a pre-requisite to accepting a job offer. It has been suggested that pressures at work can have a detrimental effect upon an individual's ability to enjoy a fulfilling home life, and vice versa leading to work-family conflict (Gordon et al 2007), although others refer to a work life balance or blend, where each activity may enhance the other areas of a person's life (Hopson 2009). This research considered both the work life and home life of older workers in the final stages of their career to assess whether

and, if so how, work life balance issues may change as they approach their retirement. The question implies that older workers do plan for their retirement, and yet it may be shown that planning for some is simply an unrealistic idea of what retirement could be like, and the approach to retirement can be a challenging transition to an uncertain life phase, which can have very negative effects upon their work life balance (Goodwin & O'Connor 2012). Connected to the main research question is a secondary question as to the extent to which government and organisational policies for work life balance and wellbeing affect older workers. This leads the researcher to ask whether the selected employer (West Midlands Fire Service) has policies specifically designed to deal with work life balance, whether those policies have a beneficial effect, and also whether there are any policies in place designed to assist its older workers.

Older workers were chosen as the focus for this research because much of the current work life balance literature tends to concentrate upon younger workers and families, and much less on those approaching retirement. The term “older workers” is often used in the UK to describe anyone aged 50+, although some EU countries consider 45 to be the time when a worker becomes older, and there are clear differences between different types of employment (for example an IT worker might be considered older at 30 whereas academics may not be considered to be older until their 60s). Changes in occupational pension schemes, the needs of older workers to work for longer, and the abolition of the default retirement age mean that it can no longer be assumed that people will retire at 60-65, and therefore the understanding of the term older worker may gradually start to shift. For this particular research a decision was made to include all employees of the sample organisation (West Midlands Fire Service) who were aged 45 or over, in order to capture the opinions of those in the final five years of work as well as those not intending to retire until they reached the age of 60/65 or later. The reason



for setting the bar at 45 is that uniformed Fire & Rescue Service (FRS) personnel have traditionally retired in their 50s having served 30 years, although the non-uniformed staff are expected to work until the State Pension Age. Following the abolition of the Default Retirement Age the proportion of older workers is likely to increase and may test the efficacy of the work life balance and wellbeing policies of the organisation. Current literature on older workers is discussed in Chapter 3, and the responses from the older workers are discussed in Chapters 6 and 7.

The choice of the Fire & Rescue Service as a focus for research arose as it became clear from the available literature that public sector organisations were not as widely researched and, through the use of personal connections, the West Midlands Fire Service (WMFS) agreed to support this research. The support from the Human Resources department of WMFS made it possible to conduct research across the whole organisation, rather than concentrating on one or two specific job roles. FRS personnel work a variety of shift patterns, and are employed on different contracts depending on whether they are uniformed or non-uniformed, and the different groups of employees have different retirement ages, and this enables comparisons of the various groups to be drawn. While there are some aspects of this particular sector that are specific to the Fire & Rescue Service, there are others that are shared with the wider public sector, and therefore it is hoped that this research will have a broader relevance.

During the research period the economic situation in the public sector became very difficult, WMFS was particularly hard hit, having to face a reduction of 9.5 per cent in formula grant funding for the year 2011/12, and 3.40 per cent for the year 2012/13. The relevance of work life balance became more acute for many non-operational staff who knew that they would either lose their jobs or have to increase their workload to cover work done by their former colleagues.

The division between uniformed and non-uniformed staff is noticeable on many levels such as pay and working hours, as well as status; and the lack of esteem in which non-uniformed staff are widely held within the organisation has had a detrimental impact upon the well-being and work life balance perceptions of many respondents. Chapter 5 discusses the background to the Fire & Rescue Service and starts to explore the responses to the research questionnaire.

Work Life Balance is a term with several possible definitions, and the term itself has been modified by academics according to the particular focus of research, for example work-family conflict (Abbot 1998, Greenhaus 2003), work family integration (Bailyn & Harrington, 2004 p 197) and work-home interference (Mostert, 2011) and these are more fully explored in Chapter 2. After considerable thought it was decided to remain with the term work life balance but to encourage the participants to provide their own definitions, and to work with whatever terms and metaphors they used, and this is discussed in the Methodology chapter. The relevance of work life balance to the Fire & Rescue Service is particularly acute in the area of decision making: put simply, poor work life balance can lead to stress, and stress can adversely affect decision making, particularly in a safety critical situation such as a fire or other emergency.

With regard to planning for retirement, this is largely driven by existing and future pension arrangements. Non-operational (non-uniformed) staff are employed on nationally negotiated contracts known as the Green Book and they contribute to the Local Government Pension Scheme which becomes payable between 60-65 and which is likely to extend to 67 or older. Operational (uniformed) staff, employed on what are known as Grey Book contracts, contributed to the Firefighters' Pension Scheme which provided for 30 years' contributions with a financial disincentive to work longer, so the majority would retire in their 50s.

This has now changed in several material technical respects which will result in most recently recruited fire fighters working for 40 years. However senior managers, most of whom expect a very generous pension lump sum payment, will find their pension lump sums capped in future. FRS employees are likely to be members of either the Local Government scheme or the Fire Fighters Pension scheme, which have very different benefits as well as different pension ages. The research was also seeking to ascertain the non-financial plans that staff were making for their retirement, whatever age they chose, and whether any chose to “un-retire” by returning to the workforce. Using the theoretical framework of life course analysis enables the transitions towards, through and beyond retirement to be explored. Metaphors for retirement, as well as for work life balance, are used in order to fully understand the various perceptions of the respondents, and to assess their readiness for retirement. Ensuring that all West Midlands Fire Service employees over the age of 45 and approaching retirement receive the research questionnaire will enable a cross-section of the whole organisation to emerge, whereas many previous studies of retirement have tended to concentrate upon male retirees (Goodwin & O’Connor 2012). Issues around retirement are considered in Chapter 7.

The Policy context can be located firstly in EU (formerly EEC) legislation and subsequently in UK legislation and policy initiatives, which have been translated into organisational policies. The background and development of this policy context will be fully explored in Chapter 2. The last forty to fifty years in the UK have been marked by dramatic increases in women’s participation in the workforce, population aging, increases in single-parent families, and increases in financial and job insecurity, and these factors have all contributed to mounting tensions between work and non-work lives (Johnson, Lero & Rooney, 2001). Organisational culture may discourage the take

up of flexible working policies (Scheibl & Dex, 1998), particularly in a male-dominated and somewhat militaristic organisation such as the Fire & Rescue Service.

There has been a disconnect between Government attempts to create a more flexible workforce and a growing appreciation of the strong business case for effective work life balance policies which enable more women to enter the workforce and increase productivity. The 2010 General Election brought in a coalition government committed to improving work life balance and wellbeing, but at a time of severe financial constraint particularly affecting the public sector, where redundancies were placing a heavy burden on remaining staff.

To take account of the aging population and the pressure upon pensions, additional legislation has extended the state pension age and also removed the Default Retirement Age so that older workers are not obliged to finish work at 60-65, and eventually both male and female retirees will receive their state pension at 67. While some employers are becoming more aware of their obligations towards older workers, their willingness to provide policies to address the work life balance needs of older workers is not yet universal. This research seeks to clarify the work life balance issues of older workers in one part the public sector and to explore the levels of support they are likely to receive.

The thesis begins with a literature review which covers two chapters; the first considering the background and variety of definitions and meanings of work life balance and the background to the policy context, which includes a discussion of both European Union and British Government policy initiatives. The second part of the literature review considers the research into age groups, generations and cohorts, and leads into an exploration of issues around retirement.

The Methodology, Chapter 4, aims to explain how the research was carried out, the research questionnaire, and why the specific research methods were used. Prior to launching straight into the analysis and discussion of the findings, Chapter 5 provides an introduction to the workings of the Fire & Rescue Service in order to explain why this sector has been chosen as the focus of the research, and to identify any sector specific issues for the staff. The following two chapters contain the analysis and discussion of work life balance and then of retirement issues with the concluding chapter bringing together the different strands of the research to answer the research question.

## **Chapter 2**

### **Literature Review**

### **What is Work Life Balance?**

The research aims to find out how individual older workers balanced the time spent in their paid employment in the Fire & Rescue Service with time spent satisfying the needs of their family, social and home life, and all their other activities; it is looking at the experiences and perceptions of both men and women, as well as uniformed and non-uniformed staff at all levels within a single organisation, and the discussion within the literature on these various aspects is key to contextualising the research question. In considering this question, account must be taken of the fact that the phrase work life balance describes the relatively modern concern over the tensions that may exist between the pressures of paid work and how they impact the time spent outside the workplace (Dex & Bond 2005). The definition of work life balance is also problematic as some researchers have sought to concentrate upon the needs of women and families (e.g. Wattis et al 2006) and others have considered work and family life to be in conflict (e.g. Gordon 2007) whereas this research sought to explore the whole of life rather than only that part of life connected to family. Furthermore, there is a divide between those who see this in terms of work-life conflict and those who see the blending of each aspect of life as enhancing the others, and being more work-life balance (Hopson 2009).

The chapter starts in section 2.1 with the historical background to work life balance, beginning in the United States and then moving across to Europe, initially concentrating upon the experience of working women and their needs for flexible working and then widening out to encompass the whole workforce,. The chapter then considers many of the various definitions of work life balance in section 2.2 including whether the term work life balance is still appropriate. In Section 2.3 the discussion is on how work life

balance and well-being at work can be affected by job design and job resources, including the influence of the manager. The chapter continues by exploring the policy context in section 2.4 in order to answer the secondary research question on the impact of national and organisational policies, starting with the European Union perspective, followed by the UK response, and finally how work life balance policies have been affected by the recession in 2009-12. This is followed in Chapter 3 by a consideration of the literature on Age and Retirement issues, and uses the theoretical framework of Life Course Analysis to study aspects of work life balance as it affects different age groups, up to how individuals deal with their work life balance issues as they approach and transition through retirement.

## **2.1 Work Life Balance – historical background, definitions and terminology**

The concept of work life balance, and its influence on well-being, originated in the United States of America. White (1956) highlighted the importance for “The Organization Man” to adapt himself to the needs of the company even if that damaged the individuality, health and wellbeing of the employee or his family. Organization men in the 1950s blended in and got along; putting the needs of the company ahead of their own; and spending their whole working lives at one company. Business courses were designed to provide organisations with managers who would not question the demands placed upon them but would work ‘until they dropped’, and organisations would only hire people who had taken those business courses (Whyte, 1956 p.105). Clearly, although the phrase ‘work life balance’ was not used at that time, the concept and danger of work causing burn-out was well known, but was seen more as a weakness of the individual rather than the responsibility of the organisation. As economic expansion, coupled with demographic changes, started to affect the United States’ employment needs, more women joined the workforce and so employers had to begin to

take account of a more diverse presence in the workplace. While women's prospects for employment improved, their opportunities for access to training and promotion to senior management roles were initially slim. US corporate employers, for example, believed that women managers seemed to cost more to employ than men even when their pay was lower; large US companies complained that turnover of female managers was higher and there was a tendency for women to take career breaks (Schwartz 1989).

Within Personnel and HR departments there seemed to be a belief that, as women were less likely to progress to the highest roles within an organisation, that was a good reason not to employ or promote them. In the 1970s and 1980s it seemed acceptable to expect women to choose between having a career and having a family. Schwartz (1989) categorised women managers into two groups, which she called career-primary women (whose careers always came before family) and career-and-family women, who sought the flexibility to both raise their families and enjoy a satisfying career. This categorisation still holds sway in some employment situations, but Schwartz's (1989) modest suggestion of creating flexible opportunities for working mothers, not simply for the promotion of equal opportunities, but as a way of increasing the productivity of organisations was seen by US employers at the time as revolutionary and unwelcome. Indeed, there are employers who, even today, do not believe that flexible working practices can provide business benefits, or find that offering flexible working is simply too costly during a recession (Bevan 2012).

Work life balance issues for women with children were further considered by Hakim (2000) who, in discussing her concept of preference theory, identified three groups of women; home centred, work centred and adaptive, each group exercising different preferences regarding the choice of working or raising children or combining the two. Hakim (2000) suggests that the conflict between having and raising children and



working within the career structure still creates difficulties for women in the 21st century. While there have been arguments that the UK government could adopt the Scandinavian model that allows women to both raise their children and follow a career, Hakim (2000) points out that many Scandinavian women follow a pattern of part-time work and part-time childcare, which does not enable them to aspire to the highest levels within organisations. Using longitudinal studies from the USA Hakim (2000) noted that neither social engineering through changes in public policy nor economic changes have managed to deal effectively with women's various preferences, and the idea of preference dictating women's career choice seemed as unlikely in 2000 as it was in the US in the 1970s when many women simply did not have a choice to exercise (Bielski 2002). Social expectations of the role of women at that time centred upon their role within the home and not in the workplace, and certainly not in the board room (Schwartz 1989).

During the 1970s and 1980s, large companies in the UK also displayed a reluctance to employ women at higher levels for a variety of social reasons, and yet found that demographic changes such as a falling birth rate, expanding industry, and equal opportunities legislation was forcing them to do so. The effort required to change the workplace to meet the needs of workers rather than expect workers to adapt themselves to the needs of the workplace seemed an unnecessary imposition. That situation continued (Hakim 2000), and some studies suggest that even when women did manage to get to senior roles within organisations, they did not tend to stay, citing isolation, bullying, being patronised and undermined in addition to lack of flexible working possibilities, as reasons for leaving (Marshall 1994, Liff & Ward 2001). The last thirty years in the UK have been marked by dramatic increases in women's participation in the workforce, population aging, increases in single-parent families, and increases in

financial and job insecurity, and these factors have all contributed to mounting tensions between work and non-work lives (Johnson, Lero & Rooney, 2001). Much of the early research (Lewis & Cooper 1999) has concentrated upon the impact of work life balance issues upon women and the family and whether women are able to exercise any true idea of preference (Bielenski 2002).

While it is not the intention of this research to concentrate specifically upon gender issues in work life balance, it is important to understand the background and history in order to appreciate the current situation, as well as acknowledging the gender aspects of women's work life balance issues, particularly as they approach retirement. There is considerable evidence (BERR 2007, CIPD 2011) that businesses have struggled to come to terms with the idea of enabling employees to identify their own needs and to structure their work in order to accommodate their personal priorities. The importance of employers and employees balancing the demands of their personal lives and work commitments has started to be recognised as a key factor in employment relations (Taylor, 2002, CIPD 2011), yet many employers have little understanding of what constitutes a healthy and fulfilling workplace, or how taking simple steps can improve the workplace, for example by discouraging long hours working; introducing flexible working practices and family-friendly policies (Investors in People 2007, Schaufeli et al, 2008). However, further difficulty arose when employers declared themselves to be "family friendly" as this created unrest among those employees without children, who found themselves disadvantaged by some family friendly policies (Haar & Spell 2008).

There are significant differences of work life balance practices across professions in the UK; women lawyers, for example, experienced particular difficulty in achieving work life balance, working, as they saw it, in a very masculine environment (Bacik and Drew 2006) which does not make easy adjustments for parenting responsibilities. This study

considered whether Hakim's preference theory (Hakim 2000) was at play but concluded that, regardless of choice, women needed to work full time and beyond in order to protect their career prospects. Webley and Duff (2007) considered the issues as to whether women solicitors and barristers are forced into the choice between mother or career progression, or gain organisational support for combining family responsibilities and career, concluding that the difficulties highlighted by Schwartz (1989) and Hakim (2000) still persist, and again found that few women with family responsibilities gained high profile posts in the legal profession. This could be due to lack of support either at work or home or that, if women are exercising a preference, they simply choose not to sacrifice all of their spare time in order to progress to the highest positions within organisations. Hakim's (2000) preference theory was again considered by Bennett and Tang (2009) and was considered by them to be too simplistic in suggesting that there are only three preferences to exercise; to become home-centred or family centred and work mainly as a 'home-maker' and perhaps providing a secondary income. The second preference type, frequently child-free, are 'work-oriented' and generally the primary or sole breadwinner but by far the largest type are 'adaptive' and choose to combine work and family without wishing to become the primary earner. Bennett and Tang's (2009) study of women in public sector organisations suggests that there could be several other preferences, and that preference itself is not a reliable indication of a woman's career path. Having said that, they then added only one additional preference type which sat between adaptive and work-centred women, and which they referred to as 'women in contention' and which covers particularly middle and senior managers for whom flexible working is not an option. This was a disappointing development; if the model of preference theory is so inadequate then surely it would be more satisfactory to provide a robustly enhanced model, rather than simply add one further strand to this model.

Taking women's life phases and situations as several distinct areas might have provided greater opportunities to test and validate preference theory.

A different view was taken following the studies by Charles and Harris (2007). In this case there is a clear change of work life balance choices particularly among younger heterosexual couples. An acceptance for whichever wage-earner is paid more to be the main breadwinner at the time is balanced with a pragmatic view that job security for both partners is less certain, which can restrict career choice of both partners. Life preferences are a luxury that is not available to the majority of middle-income couples at present. Furthermore, some professions, such as the UK Fire & Rescue Service, opt out of the Working Time Directive and simply expect the workforce to put in extra hours (Ewen 2003). Workers in the public sector seemed to have less choice regarding their work life balance than those in the private sector (Taylor 2002). Regarding the current research project, which is conducted entirely within a public sector organisation, it will be necessary to see if employees perceive themselves to be restricted in their choice of flexible working and work life balance options.

It is now necessary to explore what the phrase 'work life balance' means, and whether it is the most appropriate term to use in this current research for the way in which individuals manage to divide their time between paid work and other activities.

## **2.2 Definitions and Terminology**

The nature of any definition will depend on the position of the person defining the concept (Lakoff 1973) so a politician seeking to encourage organisations to employ more women might emphasise the business benefits of offering flexible working practices, whereas a sociologist considering the difficulties facing individuals in coping with paid employment and caring responsibilities will discuss the issue in different

terms, such as work-family conflict (Gordon 2007). The background position of the definer will affect the words used and the emphasis placed on the important aspects of the concept, so EU legislation speaks of flexicurity, as will be explained in section 2.4 below, and a feminist social scientist may speak of “work family integration” (Bailyn & Harrington, 2004 p 197), and yet neither definition may be entirely appropriate to describe the situation facing an older worker. The difficulty with such widely differing definitions is that they restrict the discussion to one small aspect of a wide subject, and ignore more important factors. While “work-life balance” has become an increasingly popular term, there is no clear consensus on what it means, although most definitions do include the concepts of flexibility, juggling and sustainability (Neault, 2005). This can lead to confusion when individuals think they know what work-life balance is; however it is most frequently used to describe some form of equilibrium between responsibilities at work and responsibilities outside paid work; so that having a good work-life balance would mean that this equilibrium is in the right position for the individual concerned. Women, for example, are likely to consider work life balance as the division between paid work and caring for the family, and Hochschild (1989) noted that the more household responsibilities that a woman had, the less likely she would be able to attain a satisfactory work life balance. Given that older female workers, coming from the baby boomer generation, are still more likely to be responsible for most housework (Jensen 2006), that is an important concern for this research, especially when considering the working patterns of older female employees.

It will be useful to look at some of the available definitions to ascertain which is the most appropriate for this current research. Considering work life balance in the employment research arena, Felstead et al (2002) offered a definition: “*the relationship between the institutional and cultural times and spaces of work and non-work in*

*societies where income is predominantly generated and distributed through labour markets (p.56)*”, which succinctly locates the phrase within labour market research, although it is doubtful that such a complex definition would be easily understood in an everyday context, particularly by the respondents to a research questionnaire. When asking respondents about their work life balance it was seen to be important to use a phrase that they would readily understand. Wattis et al (2006) use the concept of ‘work family integration’ to consider how women combine paid work with family life, through a comparative study of the UK and the Netherlands. Specifically considering whether women see taking advantage of offered flexible work arrangements as creating a long-term barrier to their career progression, the term work-family integration seems appropriate; their research sample frequently mentioned the difficulties of being the person responsible for childcare arrangements while trying to impress upon employers their willingness and ability to take on higher level work.

A fairly simple and straightforward definition of work life balance might be: *“Work-life balance is about people having a measure of control over when, where and how they work. It is achieved when an individual's right to a fulfilled life inside and outside paid work is accepted and respected as the norm, to the mutual benefit of the individual, business and society”* (Neault 2005). However Taylor (2006) doubts it can be that simple: *“It must be highly questionable whether the arbitrary and self-imposed division between work and life assumed in the concept of a “balance” between them really makes much theoretical or even practical sense. The word in the context of the workplace looks like a bogus artefact that sounds modern and cool and yet obscures more than it clarifies about the nature of the genuine problem”* (Taylor 2006 p6).

Taking the term work life balance, this appears, as Taylor (2006) points out, to treat work and life as two separate entities, and balance suggests that these two should be

held in equilibrium. There is not an easy divide between work and life, unless work is not life and life is not work, and it does not address issues of whether unpaid work falls into life or work, or how that relates to family and individual life. Some individuals have a strong division between their paid job and everything else they do; others enjoy their work and feel fulfilled by it so that it can take up most of their waking hours.

By using the term “balance” there is an implicit suggestion of an ideal goal of equality or at least equivalence (Ransome, 2007). If there is a balance to be achieved, is it the same for everyone, or are we all doing it differently? If a person spends most of their time working at an enjoyable activity, does that mean they have failed to achieve a whole and fulfilling life? And are there really two totally separate spheres of life called work and life? This could create a further difficulty if work life balance were considered an entirely subjective individual evaluation, and employers might never meet the work life balance needs of all their individual employees, and this could be an issue for a Fire & Rescue Service with around 2500 staff.

Greenhaus et al (2003) used the phrase work family balance to consider how that term related to quality of people’s lives: they considered three components of work–family balance; time balance (where equal time was devoted to work and family); involvement balance (where there was equal involvement in work and family); and satisfaction balance (in which participants declared they had equal satisfaction with their work and family). Defining work family balance as *“the extent to which an individual is equally engaged in—and equally satisfied with—his or her work role and family role”* (Greenhaus 2003 p513) enabled the researchers to identify an imbalance of time, involvement or satisfaction without addressing whether this was healthy or beneficial to the individual or to the employer. Expected findings that over-work has a negative impact upon the quality of life were countered by unexpected findings that an overall

withdrawal from both work and family life seemed to have little impact upon quality of life. While the research concentrated upon involvement and time spent with family, the researchers chose not to consider the time spent with spouses or partners as part of family life. This, in addition to the decision to exclude other aspects of life, such as voluntary work, sporting activity, attendance at church serves to reduce the usefulness of the Greenhaus (2003) research as a model for this particular current research, which is seeking to explore the balance between paid work and all other activities, although the general definition of work life balance is still useful.

Some academics refer to work-family policies designed to prevent Work-Family Conflict (Abbot 1998, Greenhaus 2003, Lapierre & Allen 2012). Work Family Conflict (WFC) refers to a situation whereby conflicting role pressures between work and family are incompatible, so that participation in one role is made more difficult by participation in the other (Gordon et al 2007), which suggested that too much time spent away from the family is somehow damaging to family life. This was also used by Konrad and Mangel (2000) to support their suggestion of a link between job satisfaction and good work life balance policies that reduced conflict between work and family and left individuals with time to spend with their family. However other research (Shockley & Allen 2007) has questioned whether flexible working arrangements can be claimed to reduce work family conflict to any noticeable extent. Byron (2005) sought to further explore the issues around work family conflict by considering its impact in two distinct ways; family-interfering-with-work (FIW – where family issues impact upon the work domain) and work-interfering-with-family (WIF – work issues impacting upon family life). These two situations have different causes and different effects upon an individual but Byron (2005) found that the effects of either direction of conflict was fairly consistent, so that work can interfere with family life and family life can interfere with



work and the impact will be much the same. Much of the research in this meta-analysis concentrated upon care for children, whereas the time caring for partners or older relatives was not included in many of the studies. Byron (2005) noted that work place stress impacted upon family life, and family conflict had an equal impact upon work, and this research seeks to establish whether that is the case for older workers across all roles in an organisation. Hopson (2009) on the other hand considers the term work life balance to encompass those situations where activities in work and home life can enhance each other, and create a benefit to the individual. For example, if employers offer flexible working forms as a way of supporting their employees, this may include term time or part time working, or the opportunity for working from home. That could reduce stress by reducing long commute times and worries about childcare; but may create additional burdens in other ways. Again looking at the gender perspective, some of the recurring findings from the research (Walters 1987, Wattis et al 2006, Lewis & Humbert 2010) suggest a widespread perception that if a woman seeks more flexible ways of working, her chances of promotion to senior levels within many organisations are severely limited, and there are certainly very few senior women managers in the Fire & Rescue Service (DCLG 2011). Some researchers have suggested that the term work-personal life integration more closely describes the dilemma facing both men and women as they deal with an increasingly invasive work life (Lewis et al 2003) and even flexible working does not improve work life balance when new technology invades family time (Lewis et al 2003). Vickerstaff (2006) notes that the role of the line manager is crucial, both in improving or exacerbating the work life balance of subordinates, as well as in the decision made by older workers as to when to retire. This is supported by the Chartered Institute of Personnel and Development (2011), which

suggested a series of competences that would improve work life balance and well-being and therefore lead to improvements in employee engagement in the workplace.

**Table 1: CIPD Management competency framework with brief descriptions**

Theme	Management competency	Description
Supporting employee growth	Autonomy and empowerment	Has trust in employee capabilities, involving them in problem-solving and decision-making
	Development	Helps employees in their career development and progression
	Feedback, praise and recognition	Gives positive and constructive feedback, offers praise and rewards good work
Interpersonal style and integrity	Individual interest	Shows genuine care and concern for employees
	Personal manner	Holds regular one-to-one meetings with employees and is available when needed
	Availability	Demonstrates a positive approach to work, leading by example
	Ethics	Respects confidentiality and treats employees fairly
Monitoring direction	Reviewing and guiding	Offers help and advice to employees, responding effectively to employee requests for guidance
	Clarifying expectations	Sets clear goals and objectives, giving clear explanations of what is expected
	Managing time and Resources	Is aware of the team's workload, arranges for extra resources or redistributes workload when necessary
	Following processes and procedures	Effectively understands, explains and follows work processes and procedures

CIPD (2011) *Management Competencies for Enhancing Employee Engagement* Chartered Institute of Personnel and Development Accessed October 2012

<http://www.cipd.co.uk/hr-resources/research/managementcompetencies-for-engagement.aspx>

Just as academics have sought to narrow the definitions, political definitions in the UK have centred on the notion of family friendly working practices as part of the equality agenda, i.e. those that enable more women to join the workforce to enhance the UK's economic performance. "Family friendly" was the phrase adopted by the previous Labour Government to distance itself from earlier Conservative employment practices, and the term work/life balance was introduced into New Labour Government policy statements from 2000 (McKay 2001). The right to additional maternity leave and to request flexible working had been introduced by legislation, and was fully supported by

the Equal Opportunities Commission, which is now part of the Equalities and Human Rights Commission. However, while the UK government often promoted the business case for work life balance, the emphasis throughout is still upon increasing the numbers of women working in paid employment. This creates a potential difficulty: if work life balance is considered to be only about enabling women to cope with the demands of paid work while not neglecting their children, then an employer might discriminate against child-free workers and provide flexible working patterns only for women with parenting responsibilities (Haar & Spell 2008). Ransome (2007) noted that over 60% of UK households consist of families with no dependent children, or individuals, and yet much of the current work life debate is about enabling family life to co-exist with work demands. Of course it could also be argued that providing additional support to families with children is necessary for society to ensure that enough people have children to care for the ageing population – although living in a country that is very attractive to migrant workers this may not be a realistic problem that needs to be addressed. It may be that we are looking for new uses of time to address the “total responsibility burden” of work, life and recreational labour (Ransome 2007). UK politicians have sought to enable women to integrate work and family life more closely without addressing the counterpart to the situation; that of encouraging men to take on an equal share of family tasks and therefore policy initiatives alone may be unsuccessful (Beauzamy 2007).

There are also suggestions that the term “Work life balance” is itself too heavily gendered (Wattis et al 2006). For many men the balance between work and life had traditionally been the balance between paid work and leisure time; where very long or arduous working hours or work carried out during unsociable hours may interfere with social activities such as family time, sport, or time at the pub. For many women the balance between work and life had been the balance between paid work and unpaid

work; the balance between earning money and looking after family. While this gender split was true in the past, researchers are still reporting gendered differences in approach despite legislative support for equality (Wattis et al 2006). Many women report having two jobs, one paid and other unpaid, and that their life consists of travelling from one to the other, the balance being that of family responsibilities, shopping and adding to the family's income (Ferber & Birnbaum 1980, Wattis et al 2006). This long-standing gendered imbalance has led to some academics (Lewis et al 2003, Hacker & Doolen 2003, Gatrell et al 2012) suggesting that work life balance is itself a problematic term to describe the difficulties involved in dealing with a long hours culture and traditionally gendered assumptions embedded in the caring and domestic responsibilities. While this current research into work life balance of older workers is not centred upon issues of gender, any consideration of balancing life inside and outside of the work place may well affect men and women in different ways. This may have implications for the research in an organisation where there is a very clear gender split and therefore it is important to consider how work life balance issues affect both men and women in the research sample.

Research comparing the combination of work and family life for women in the UK and the Netherlands (Wattis et al 2006) found that the experience of work life balance for many women is an on-going process as they continually negotiate the boundaries of work and family. Flexible working practices and access to flexibility is more likely to be negotiated at organisational level and, for many women, is likely to be more successful than relying upon the legislation. Informal workplace cultures and attitudes tend to militate against the take-up of flexible working practices (McDonald et al 2005). However they also found that fewer workers than expected opted for part time work, and concluded that this may be because part time women workers were less likely to be

promoted to supervisory roles or to develop careers. The strong emphasis upon definitions that are designed to support women's employment and family friendly policies is problematic for this research, which is centred more on work life balance issues towards the end of a working life, regardless of gender, as are some of the definitions espoused by employers' groups and professional bodies.

Definitions from employers' advisory organisations such as the Chartered Institute of Personnel and Development (CIPD) tend to emphasise the benefits to the organisation rather than individual. The CIPD advocate the implementation of work life balance policies by highlighting the business case to employers, and suggest that the increased management costs will be far outweighed by *"higher productivity and competitiveness, increased flexibility and customer service, for example to cover for absence and holidays , raised morale, motivation, commitment and engagement, reduced absenteeism, improved recruitment and retention of a diverse workforce, wanting to become an 'employer of choice' as well as meeting legal requirements"* (CIPD 2009).

The CIPD also promotes the ways that managers can line-manage individuals who are working flexibly or at a distance (Clutterbuck 2003). Other definitions attempt to portray a win-win situation: work life balance being about the challenges that face individuals when they are trying to hold paid work and home in domestic life in balance. The benefit to the individual is that they have sufficient time and energy to enjoy their domestic and social life. The benefit to the employer is an enthusiastic, alert employee who has the energy and mental capacity to perform the work required.

Employers' associations and personnel advisors may be helping employers finding ways to encourage and motivate staff to work harder without burning out, or suing for stress-related illness (CIPD 2009). There is a belief among many in the UK that there is a culture of working longer hours than the contractual requirement. Many workers, even

today, feel under an obligation to arrive early and leave late, to take work home, to forfeit their holidays and to put the job before their family, and these beliefs will be explored in the research.

Another professional body, the Chartered Management Institute, again promoting the business case for work life balance, offers this definition in its report by Worrall and Cooper (2007): “*Work-life balance is the equilibrium between the amount of time and effort a person devotes to work and that given to other aspects of life*” and includes a very wide range of possible policies that an employer might consider, including term time working, job sharing, working from home and other flexible working practices. These organisations all recognise that work life balance is not simply a women’s issue, and that all employees can benefit from well thought out flexible working practices that will increase productivity and reduce absenteeism (Worrall & Cooper 2007).

So what is the most appropriate term for this current research? Those definitions that place work life balance issues firmly around women and their responsibilities for the family, such as work-family interface, may not necessarily be suited to a research sample in a predominantly male occupation of fire-fighting, although a significant proportion of non-uniformed staff is as likely to be female (the gender issues within the research sample group are discussed in Chapter 5 – Fire & Rescue Service). Definitions such as work family conflict suggest a right or wrong approach, so that if there is a perceived conflict with work or family it may be the fault of the employer or of the individual, and that might seem to be an unhelpful position for a researcher. However, there is clearly a conflict for some workers, and the idea that too much time spent at work will impinge upon time available for family activities is a valid one. On the other hand, the notion of a work-life blend (Ciolfi et al 2012) has gained acceptance in

describing the way some workers do not have a clear boundary between paid work and other activities.

Several of the other definitions such as work family integration again come from the position of women's employment, and a presumption that family is what women are mainly interested in and have the larger share of responsibility for, and this is not necessarily the most appropriate language for this research sample. What would be the term or phrase best understood by those about to participate in the research? People who are not academics, social policy advisors or politicians would be more likely to use an everyday term such as work life balance even though they may all mean different things when they say it. So, despite the fact that this could be more problematic, for this research the basic term work life balance is the most appropriate. In order to overcome the disadvantages of using a widely used but often misunderstood term the participants to the research will be asked for their own definitions of work life balance, and it should therefore be possible to work with a wider collection of terms. Individuals' perceptions are still important as a perception of good work life balance, even if the perception is not accurate, can lead to an improved feeling of well-being (Hill et al 2001), and therefore the term 'work life balance', although imperfect, will be used in this research.

Having considered the most appropriate term and definition of work life balance for this research on older workers, the next step is to consider how that balance can be impacted by the way in which the job has been designed and resourced. Simply put, there has been considerable research into the way in which a poorly designed job can create high work pressure, leading to sleep problems and impaired health whereas a well-resourced job providing good support, fair performance feedback and an element of autonomy can improve motivation and employee engagement (Bakker & Demerouti 2007) thus improving productivity and the quality of decision making.

## **2.3 Job Design and Job Resources**

The relationship between work life balance, stress, and the way that a job is designed and resourced, can have serious health and well-being implications for older workers. Mostert (2011) set out to test a structural model which used questionnaires and evaluations on (a) job demands and job resources, (b) negative work-home interference (WHI) and (c) burnout, which includes exhaustion, cynicism and cognitive weariness and to establish whether there was a foreseeable relationship between them. She tested the model on South African construction workers, which is considered to be a dangerous occupation, and which could fairly be compared to the British Fire & Rescue Service in that there are long hours, hard work, hazardous conditions and, currently, a need to keep operational costs as low as possible. The study took the rather singular perspective of work-life conflict, in that Mostert (2011) was testing whether issues at work had a negative impact upon the other activities of the individuals' lives and whether any improvements in job resources might mitigate that negative impact. Negative WHI was considered to be serious for the individual but also for the organisation "e.g. reduced job and life satisfaction, low organizational commitment and intentions to quit, stress and burnout, low levels of job performance, and the prevalence of accidents" (Mostert 2011 p1037). A wider view of work life balance might, on the other hand, have also considered the beneficial impact of job resources for both worker and employer and could have explored greater opportunities for work to enhance social life and social life to enhance work (Chang 2010). However, even using this constrained and focussed approach, Mostert's findings clearly have relevance for older workers in the Fire & Rescue Service as detailed below.

Mostert used the job demands-resources (JD-R) model (Demerouti et al. 2001; Bakker et al. 2003) to consider various job characteristics that can have a positive or negative



impact upon the individual worker. Job demands such as long hours, increased workload, complex problems requiring sustained mental or physical effort carry a cost, whether psychological, physical or psychosocial. Job resources carry a positive benefit to the worker, and these include supportive colleagues, job control, good managers, achievable goals, recognition and adequate financial rewards (Bakker & Demerouti 2007). Bakker, Demerouti and Schaufeli (2003) suggested that increased job demands can cause stress and burnout, whereas improved job resources can reduce the stress and improve the individual worker's well-being, which can have a beneficial effect upon the organisation. They also suggested that too many job demands can have a detrimental impact upon the work-home interface. Excessive job demands can also impact on the decision making ability of an individual, whether at work or other aspects of life (Klein 1998). This was further supported by Flin et al (2008) who argue that safe and effective decision making can be affected by a variety of factors, including "stress, fatigue, noise, distraction and interruption" (Flin 2008 p 57). A further factor is the detrimental effect on health of shift working, particularly for older workers (Bohle et al 2010), and irregular shift patterns such as those in the Fire & Rescue Service can be especially harmful (Heffernan 2011). The gradual intensification of work has created difficulties for many workers in seeking to balance the demands of work with the demands of family and social life. Negative work home interference occurs when the demands of work seriously outweigh those from home, particularly in a long term situation, and can have a damaging effect upon the health and well-being of the worker which, Mostert (2011) suggests, may have a clearly foreseeable effect upon the organisation through increased accidents and staff turnover. This was measured using the negative Work Home Interference scale of the 'survey work-home interaction-Nijmegen' (SWING); (Geurts et al. 2005). Burnout was measured using the Maslach Burnout Inventory-

General Survey and covers three aspects: physical exhaustion – where the individual is incapable of performance as all energy is drained; cynicism – where the individual is indifferent to work, and cognitive weariness – where the individual is forgetful, cannot concentrate or problem solve (Schaufeli et al 2008), usually occurring when the individual is exhausted. This was also measured using the Cognitive Weariness Scale. The research on cognitive weariness has strong implications for some workers in the Fire & Rescue Service particularly where fire-fighters are working long shifts with poor facilities for rest and are then called out to work strenuously on a fire. The purpose of Mostert's (2011) research was to establish whether there was a relationship between job demands-resources, negative work-home interference (WHI) and burnout, given that there were already established relationships between job demands and burnout, and job demands and negative WHI. Mostert's (2011) results showed that while high job demands and low job resources would not inevitably lead to burnout, they would probably lead to negative WHI, which in itself is strongly linked to burnout. While job design is important for employees of all ages, the impact particularly on older workers and their work life balance will be explored in the research questionnaire and the follow up emails and interviews.

A further consideration of work life balance and wellbeing issues arises in the way in which employees are supported by their manager. There is considerable research on how the manager and their management style can impact the health, wellbeing and work life balance of the worker (Hogan, Curphy and Hogan, 1994, Tepper, 2000, Vickerstaff 2006, Skakon et al, 2010, Alfes et al, 2010). Poor management can, and probably does, damage well-being and work life balance, whereas good management can enhance it. Indeed, a recent review of the available evidence (Kelloway & Barling, 2010) concluded that: *"sufficient data have now accumulated to allow the unambiguous*

*conclusion that organisational leadership is related to, and predictive of, health and safety-relevant outcomes in employees”* (p275). Given the importance of good management to the work life balance of older workers, it is now appropriate to consider whether government or organisational policy initiatives have provided the support needed to improve work life balance and wellbeing at work.

## **2.4 Introduction to the EU Policy Context**

In looking at the extent to which older workers in the Fire & Rescue Service deal with work life balance issues as they plan for, approach, and transition through retirement, it is clear that this may impact upon or be affected by European, national and regional policy (Lewis & Campbell 2007a). Some of these policy implications may affect men more than women or vice versa; some of these points may be affected by social class and by ethnicity. While issues of gender, class, ethnicity and locality will inevitably arise in this research it is the intention to look in greater detail at those issues that affect the work life balance of the individual in the latter half of their working life, and how (if at all) policy impacts upon those issues. However the following section on the historical background will show how important gender and family issues were to the initial aspects of the debate.

### **2.4.1 EU Policy and Work Life Balance**

It is necessary to provide a brief historical background of some of the relevant policies of the EU before considering the more recent reforms and future plans and how such developments have supported Work Life Balance. This section then explores how aspects of Work Life Balance in the UK have been influenced by European law and policy.

### **2.4.2 Development of EU Social Policy**

The 1974 Social Action Programme acknowledged the need to deal more specifically with social policy issues: the First Programme of Social Action set objectives of improving living and working conditions for particularly vulnerable groups in society, and the European Council adopted directives on equal opportunities and on health and safety at work as well as action programmes for the disabled, the poor and the elderly. It could be argued that, in relation to women's working opportunities, this was the first limited step towards the theme of work life balance (Taylor-Gooby 2003). However, this programme did not address the wider issues of work life balance of younger or older workers, part timers or those in economically weaker positions, such as migrant workers.

The 1986 Single European Act strengthened the social and political drivers of the EEC by introducing new responsibilities for the Community, which explicitly included environment, social policy, and also economic and social cohesion. These were given added protection by agreeing that policy decisions should be by majority vote rather than unanimity (Single European Act 1986). These new social policy objectives had taken several years to be agreed by the Member States, but created a new impetus for social reform, within which improvements in working and living conditions could be effected. The Social Charter, which listed fundamental rights for workers, was passed as a non-binding Solemn Declaration (with the UK government voting against) at the 1989 Strasbourg summit. Tracking the results of votes throughout the history of the UK's membership of the EU, the UK has consistently demonstrated a reluctance to adopt employment and social policy enhancements, possibly in an attempt to preserve a more flexible control of the workforce. While it could be said that the Social Charter was designed to improve social equality across the Member States, others were suggesting

that the rigid approach of the Social Action Programme would inhibit equality (Addison & Siebert 1991). The Social Charter influenced the 1989 Social Action Programme, but was overshadowed by the issue of monetary union in the subsequent debates about the Maastricht Treaty (Taylor-Gooby 2003).

At Maastricht in 1992 the Member States, in moving the EU further towards “an ever closer union” (Duff, et al 1994 p3), agreed a set of objectives to create a stronger political dimension to the European Community, the objectives being:

- To promote economic and social progress including consumer protection, environment and industrial policies
- To assert an identity on the international scene through the implementation of a common foreign and security policy.
- To protect the rights and interests of nationals of the Member States by introducing the concept of a European Citizenship, including the right to reside and vote throughout the community.
- To develop close cooperation on justice and home affairs (including asylum policy, external borders and drugs) and the creation of a European police force EUROPOL.
- To build on the existing body of Community law to ensure effective mechanisms and institutions for the further progress at Community level.

The high-minded ideals of the Maastricht Treaty were stated as “*The Community's task is to promote throughout the Community a harmonious, balanced and sustainable development of economic activities, a high level of employment and of social protection, equality between men and women, sustainable and non-inflationary growth, a high degree of competitiveness and convergence of economic performance, a high level of environmental protection, the raising of the standard of living and quality of life, economic and social cohesion and solidarity among Member States*” (Maastricht Treaty Article B, 1992). These ideals clearly lead to the aspiration for improvement of working life for EU nationals, and the notion of work life balance as part of an enhancement to work began to gain wider acceptance. However, not all of the Member

States could accept all of the financial aspects of the Treaty, particularly the establishment of the Euro zone. *“The Community pursues these objectives, acting within the limits of its powers, by establishing a common market and related measures set out in Article 3 of the EC Treaty and by initiating the economic and single monetary policy referred to in Article 4(3a)”* (Maastricht Treaty, 1992 – Treaty on European Union 92/C 191/01). The UK again negotiated an opt-out from the social policy aspects, seeing this as a “treaty too far” (Duff et al 1994 p4) and Denmark held a referendum where the majority rejected the Treaty outright and therefore the dual aspirations of monetary union and improved social policy were not going to happen at the same time, if at all.

#### **2.4.3 Introduction of the Working Time Directive**

One of the most contentious issues that affects work life balance is the Working Time Directive, which emanated from the principles in the Maastricht Treaty (Council Directive 93/104/EC) and which was not adopted in the UK until 1998 following a case in the European Court. This has had a direct impact upon work life balance in the UK today. The aim of the working time directive was to ensure that workers are protected against adverse effects on their health and safety caused by working excessively long hours, having inadequate rest or disrupted work patterns.

The working time directive provides for:

- a maximum 48 hour working week averaged over a reference period;
- a minimum daily rest period of 11 consecutive hours a day;
- a rest break where the working day is longer than six hours;
- a minimum rest period of one day a week; and
- a statutory right to annual paid holiday of 4 weeks;
- night working must not exceed eight hours a night on average

There were exemptions from the Regulations, and the UK position created an ability for some employers to insist that their workers opt out, for example emergency workers, doctors, construction workers, etc. This was subsequently investigated by the EU Commission who found that the UK position permitted abuse of workers, and insisted upon improvements in UK legislation. Some public sector workers, for example junior doctors in the NHS, became subject to the 48 hour average working week in 2009, while other organisations, such as the Fire & Rescue Service are still opting out from the directive. Detailed study of workers within the West Midlands Fire Service will be carried out for this research, and it is anticipated that the impact of the opt-out upon flexible duty officers in the West Midlands Fire Service will be a major source of work life balance issues for some older uniformed workers, and also for retained firefighters and others who volunteer for public service duty. The likely impact of this is discussed in Chapter 5, which looks at the issues affecting the Fire & Rescue Service in greater detail. However it should be noted here that the most recent re-negotiations regarding changes to the Working Time Directive failed to reach agreement by the December 2012 deadline, meaning that it is unlikely that there will be any changes to the opt out in the foreseeable future.

A further step towards providing work life balance was the right to parental leave. The EU had passed a directive in 1996 but, as the UK had negotiated an opt out of those parts of the Maastricht Treaty that covered social policy provisions, the UK was exempt from this. Eventually, during further negotiations, the UK finally agreed to accept the social policy provisions and these were incorporated into the Amsterdam Treaty 1997. The provisions came into force in 1999, and required the UK to apply the working time directive, the parental leave directive and the directive on part-time workers. The reticence of the British Government to adopt EU policy relating to working rights is a

classic example of the difficulties facing Europe in introducing its social policy agenda. The fear of transfer of influence and control over social policy issues, coupled with the power of employer groups has not just been a British problem, and several of the Member States had encountered difficulties in fully adopting the new agenda (Blair, Leopold & Karstan 2001). However, for the purposes of this research, the reaction of successive UK governments over the years has been a clear example of an overriding reluctance to adopt work life balance measures that improve working life in general.

The parental leave directive was explicitly designed to help in the development of family friendly employment systems. It included men as well as women in the entitlement to time off in connection with the birth or adoption of a child, and was set up to assist parents in combining the demands of work with family life (McDonald 1999). Promoted as a benefit to employers by increasing the numbers of women returning to work and saving the costs of employment and training of new staff, the directive has been criticised by small employers in light of the additional costs burden. However, the directive left it to individual Member States to decide the exact details of length of service required, and what amount of leave would be paid. The Amsterdam Treaty also paved the way for the first European Employment Strategy (EES), which created a cycle of co-ordinating national employment policies while allowing individual Member States to set their own national action plans. The employment guidelines in the EES direct the Member States to consider working time policies and create additional opportunities for part-time and flexible working. The section on 'Reconciling work and family life' in the Equal Opportunities pillar of the earliest EES guidelines states that:

*"Policies on career breaks, parental leave and part-time work, as well as flexible working arrangements, which serve the interests of both employers and employees, are of particular importance to women and men... An equal sharing of family*



*responsibilities is crucial in this respect*” (Council Resolution of 15 December 1997 on the 1998 employment guidelines, as amended by Council Resolution of 22 February 1999 on the 1999 employment guidelines) (European Foundation for the Improvement of Living & Working Conditions 2003). While the 1997 Resolution spoke of the equal sharing of family responsibilities, it is clear from available data that this varies widely across and within the various Member States (Eurostat 2008). The Adaptability pillar of the EES contained guidelines to increase the flexibility of workers and work organisation arrangements so that employment could be increased. So, for the first time, work life balance was formally featured in EU policy, and this enabled European funding to be provided for projects to support activities specifically designed to establish work life balance. Again, it is important to note that this was not entirely altruistic: the White Book on Growth, Competitiveness and Employment, published by then EU President Jacques Delors in 1993, had highlighted the threats from the emerging economies of China and India to the economic stability of the EU. He noted that the economic challenge from the developing world put pressure on national governments and the European Commission to address the regional issues of low productivity, low employment and economic instability, by taking action to increase employment across Europe, particularly among women (Delors 1993).

#### **2.4.4 The impact of the Lisbon Agenda**

At the EU Council of Ministers meeting in Lisbon in March 2000 the European Union set itself the ambitious target of developing as the world’s most successful and dynamic economic region within the decade (Bloomfield, 2007). The period until 2005 proved extremely disappointing in meeting those aspirations. The Council of Ministers meeting in 2005 acknowledged the very limited progress that had been made and tried to provide a tighter focus onto growth and jobs by re-launching the Lisbon aspirations, and

outlining a set of Guidelines with 24 key tasks, the first sixteen relating to broad economic policy and the last eight relating to employment policies. These Guidelines, usually referred to as the Lisbon agenda, had a strong supply-side emphasis, seeking to draw more European citizens into the world of work. Thus the employment guidelines began by setting as its Lisbon target an overall employment rate of 70% by 2010, with a specific target of a 60% rate for female employment to be achieved by that date (Guideline 17). Clearly, the need to increase female employment rates had to be supported by mechanisms that made the workplace a more convenient place to be, and that included measures to improve workplace adaptability through the introduction of flexible working. Effective forms of flexible working were also required to retain older workers in the workforce, signifying the realisation that employers could no longer recruit only younger people to meet their labour needs.

The Lisbon agenda and the EES guidelines are now reviewed regularly to ensure that a cohesive policy is always in place. However, given that Member States have considerable freedom as to how they implement some of these guidelines, it is now necessary to set out the various situations across Europe to assess the extent that EU policy has impacted work life balance. Families across Europe now face a diverse set of challenges when trying to reconcile paid work with family responsibilities. This is partly a reflection of the historical division of labour within the home, but is also a result of the way in which EU policies have addressed the pivotal economic role of working women and the need to increase the proportion of women in the workforce (Kay 2003). Although there are national differences due to economic and social class, educational background, political structures and the relative wealth of the country, families across the EU experience difficulties in trying to achieve work life balance.

Kay's research (2003) noted that poorer families experience of work life balance was that of financial insecurity, under employment and seeking stability to achieve family well-being; in other words, making enough money to feed the children. These families had a greater need for support from government or European policies. On the other hand, high wages but long working hours led to difficulties in scheduling domestic and family activities. However, well educated, wealthy families were less likely to depend upon policy interventions as they were more capable of hiring in the domestic help they felt they needed (Kay 2003).

One of the guidelines issued in the Lisbon Strategy in 2000 was to improve quality in work and employment. This was adopted the following year in Stockholm as a horizontal (or cross-cutting) objective, together with all anti-discrimination issues, meaning that all the guidelines in the Lisbon Strategy should be assessed in terms of quality. So the targets for more jobs also included better quality jobs (Peña-Casas, 2007) and the need to work more flexibly (Bevan 2012). This has particular relevance to changes made to Fire & Rescue Services and subsequently in the work carried out by West Midlands Fire Service in their policies for wellbeing and flexible working. There have been a number of changes to working practices in the FRS, for example in working hours, shift patterns and facilities for rest at Fire Stations, which have not always been well received by the uniformed workforce. For non-uniformed workers the threat of redundancy to make cost savings has seemed to reduce the quality of work, and both uniformed and non-uniformed staff speak of the need for them to be flexible although the employer is not seen to provide equivalent flexibility. Peña-Casas (2007) was writing prior to the recession in the UK in 2009-11, and the pressure on the public sector to reduce staff costs while maintaining service levels has inevitably placed

greater pressure on the remaining workforce. The impact of this upon the older workers in the Fire & Rescue Service will be discussed later in Chapter 5.

#### **2.4.5 Flexicurity**

Flexicurity can be said to be a mixture of flexibility and security, as defined by Wilhagen and Tros (2004), and is discussed more fully below. Although the exact interpretation of quality in work and employment has changed over the past few years, once a concept has appeared in the European policy field and has been approved by the European institutions it remains present in European debate, and so this is still an issue that Member States must acknowledge. The current interpretation by EU policy makers is more in terms of job productivity and financial incentives for job creation, rather than the original desire to promote the well-being of citizens and workers. Peña-Casas (2007) notes with concern that quality of work and employment has since been reduced to four aspects; “*workers' rights and participation, equal opportunities, safety and health protection at work and a family-friendly organisation of work.*” (European Council, 2007:3) and he suggests that the concept of flexicurity has taken an overarching and disproportionate precedence over the whole aspect of quality. The debate over quality in work and employment fully acknowledges the political and economic dimension as well as the social benefits: if jobs are of better quality (by whatever measurements are set) then more people will want to get into and remain in work for longer, which will stimulate economic growth and national productivity; higher quality jobs which are better paid may also have a positive impact on reducing poverty and social exclusion and so improve social cohesion (Peña-Casas 2007). Peña-Casas (2007) further notes that, using the aspect of work organisation and work-life balance as a measure of quality, annual studies show that poor quality, dead-end jobs are more likely to be taken by women, particularly those with low skills. Such women

are more likely to be low paid, leading to the conclusion that work life balance is less likely to be achieved with low quality work. Geographically, it can be noted that northern European states have generally higher quality jobs than the poorer, southern European states, and that the northern states are making faster progress in creating more high quality jobs (Bevan 2012). However, there is evidence that those in low paid or poor quality jobs also experience poor quality non-work (Gallie 2002 p108) in that social, leisure and family time are likely to be constrained by a combination of lack of money and physical tiredness from the paid job.

Other differences between Member States include persistent gender inequalities when it comes to caring for dependants, employment and salaries, participation in areas of political and economic decision-making, as well as personal health, all of which can have an impact on work life balance (Eurostat, 2008). These statistics provide an insight into the EU purpose for work life balance. Given the Lisbon goal of 70% overall employment and 60% female employment by 2010, there are already some EU states that exceed those figures, whereas others are well below; within the 15-64 age group 81% of men are in employment in Denmark and Holland, but only 61% in Poland. For women, 73% are in employment in Denmark and only 46% in Italy (Eurostat 2008). Across the EU, the majority of women (61%) are working in health care, social work, retail, education, business and public administration, and hotel/catering, while only 31% of men are employed in those sectors. At the same time that the Lisbon agenda was raising targets for female employment rates, the EU, faced with a shrinking and ageing workforce, proposed in its European Employment Strategy 2003-2010 to increase the numbers of older workers still employed at the ages of 60-65, which was followed by the Europe 2020 Strategy to reach 75 per cent employment of all Europeans aged 20 to 64 by 2020. The UK, along with most other EU member states, is working towards

achieving these targets. Implications of the comparison with UK data are more fully discussed in the next section on UK policy.

Work life balance is easier to achieve in better quality jobs, as has already been noted (Pena-Casas 2007) and yet in the occupational areas where women are mainly employed, they do not generally occupy the senior, better paid and better quality jobs; men are more likely to have those roles. This gender segregation is reflected throughout the report (Eurostat, 2008), for example women generally work less hours than men, and are more likely to be in part time work. Despite the generally accepted notion that flexible working arrangements add to the quality of work and life, only 25% of employees in the EU have access to flexible working, and slightly fewer women than men have access to such arrangements (Eurostat, 2008). Those occupation areas where the majority of women tend to work do not have more flexible working patterns, although many jobs have atypical working hours. Working time arrangements in most parts of Europe do not seem to provide much support for people with children.

Unusually, employees with children seem to be less likely to find work in jobs with flexible working arrangements than those without. So it seems fair to suggest that, despite the increase of EU policies, historical evidence indicates that work life balance is not yet fully supported across the member states. Implications for my research from this historical view are that care needs to be taken when formulating questions on work life balance in an organisation that claims to have enlightened work life balance policies.

Despite the evidence that innovative working time and work–life balance policies can lead to a variety of positive impacts at company level, including enhanced employee performance, reduced absenteeism levels, better recruitment and retention potential as well as greater overall time efficiency (European Foundation for the Improvement of

Living & Working Conditions 2006), employers and national governments seem reluctant to fully implement flexible working practices (Bevan 2012). Younger and older workers are taking more part time positions (European Foundation for the Improvement of Living & Working Conditions 2006), and workers of all ages are seeking more control over their working time: *“Where flexible working has been implemented, it does appear to have a beneficial impact on work–life balance. The small proportion of workers who do have flexibility or control over their working hours are also those reporting the highest level of satisfaction with their work–life balance”* (European Foundation for the Improvement of Living & Working Conditions 2006).

Working women, the report found, have to juggle the demands of paid work with unpaid domestic work, and when unpaid working hours are added to paid working hours then, across the EU, it was women and not men who had a significantly longer working week. Looking to the future, the EU plans seemed to move towards a concept of flexicurity, a mixture of flexibility and security, defined by Wilthagen and Tros (2004) as *“... a policy strategy that attempts, synchronically and in a deliberate way, to enhance the flexibility of labour markets, work organisation and labour relations on the one hand, and to enhance security – employment security and social security- notably for weak groups in and outside the labour market on the other hand.”* Tangian (2005) argued that this type of flexibility is not designed to give workers security within a system of flexible working patterns, but more likely to try to hold the balance between employers who want deregulation of markets, and employees trying to protect their rights. He suggests a second definition that would provide greater appeal to trade unionists: *“[Flexicurity is] social protection for flexible work forces, understood as ‘an alternative to pure flexibilization’ and ‘a deregulation-only policy’”* (Tangian 2005 p.22). Fredman (2004) noted the imbalance between flexibility and security, suggesting

that the reality was greater flexibility on the part of workers in return for less job security. She also commented that women were less likely to benefit from flexicurity as the “work” element concentrated on paid work, and that, across the EU women still remained responsible for domestic work and childcare in addition to contributing to the family income, and claiming that, *“Far from achieving a work-life balance, flexible working means that many women shoulder the double burden of paid and unpaid work, but without any guarantees of an adequate income”* (Fredman 2004 p 300). The fact that more women’s jobs are part time impacts not only on the immediate family income but also on pension and national insurance contributions, and thus leads to a longer term disadvantage. She notes the impetus provided by EU policy through directives on parental leave, working time, part time and fixed term workers, and how the UK government has taken those forward and included national minimum wage and improved UK employment rights. These, Fredman (2004) argues, could form the basis of an improved situation for non-standard workers and for women in general.

A different view could interpret flexicurity as an opportunity to improve the working position of all workers, at all stages of their working lives, (Klammer 2004). Taking a life-course perspective, and comparing German and Danish experience from longitudinal studies with more general EU figures, the data suggests that younger workers are more likely to be engaged on fixed term and limited employment contracts, and that this is not necessarily a voluntary choice. Men are more likely to earn more during their later years at work, gain more promotions, and tend to work more years than women workers. Klammer (2004) proposed greater support from social security in order to provide the financial support as workers move through their different life phases and take career breaks. This is not to suggest dependency, but more an



empowerment to enable “*people to gain or regain their employability*” (Klammer 2004 p.289).

So consideration of the historical journey of work life balance through Europe has shown some real progress being made in the name of social justice as well as a sound business case for flexible working practices; however the UK situation demonstrates consistent reluctance to change the status quo at every stage. The next section will consider the UK situation in more detail and will highlight the areas where work life balance can be explored in further detail.

## **2.5 UK Policy on Work Life Balance**

In the UK, successive governments have failed to be anywhere near the forefront of work life balance improvements, indeed on many occasions the UK has changed its practices only very reluctantly despite being a member state of the European Union since 1973, and therefore obliged to follow EU policy, so has had to make changes to its own legislative framework as the policy of the EU has developed (Fagnani 2011).

The avowed aim of successive UK Governments has been to benefit industry by creating a flexible workforce, and that has often been at the expense of employee rights. However, many of those EU measures are now enacted into UK law and so it is now appropriate to examine the UK policy. It should be noted that the majority of the legislative changes have been based upon the concept of work life balance as balancing work with family life, and there are still major policy gaps in dealing with other work life balance issues, such as the needs and expectations of younger workers and those nearing retirement. While it is accepted that working women should not be disadvantaged in the workplace by having to juggle paid work and parenting responsibilities, it will be argued that work life balance issues facing workers as they

head towards retirement and need to make decisions regarding their pensions and what they will do after retirement age still need to be more fully addressed by UK policy makers. Despite the lack of legislative direction however, some major retailers have found that providing good work life balance policies makes good business sense (Vickerstaff 2005). Asda for example, offer a wide range of Work/Life balance options, including:

- IVF leave (five days' paid leave to women undergoing IVF treatment, and 1.5 days for partners);
- 'Benidorm' leave - up to three months unpaid leave between January and March while maintaining a continuous work history (in addition to paid annual leave);
- Grandparent leave - five days unpaid leave on the birth of a grandchild;
- Sabbatical leave - up to two years' unpaid leave while remaining a member of staff and with a guaranteed job on return;

Employees at Tesco can also take holiday for a wide range of reasons, including Grandparent Leave, Carers' Leave, Study Leave, Religious Festival Leave and Yellow Ribbon Leave – a paid day's leave to staff with relatives returning from military service in Iraq (Vickerstaff 2005). This is in addition to policies that permit students to transfer their employment from their home town to their university town and back again, and parents to opt to work only in term times. These policies can create bureaucratic difficulties but clearly must still be worth the effort as profit and productivity still rises.

Apart from the Working Time Directive, from which many employers can still opt out, government policy designed to encourage flexible working or other work life balance measures that would benefit younger workers, or that protect older workers approaching their retirement has been slow in coming (Lewis & Campbell 2007a). For those older workers in a final salary pension scheme, there is no opportunity to reduce their working hours without affecting their pension entitlement, and the research findings

discussed later will consider how that affects some of the older workers in the West Midlands Fire Service specifically and public sector employees more generally,

Lewis and Campbell (2007) traced the changes in UK policy over the three Labour terms of government; suggesting that social policy in relation to work/family balance and to family policy in general changed dramatically from 1997 to replace a vacuum of family policy with a raft of policy initiatives and legislation that has raised the profile of work life balance in the UK. While they do acknowledge that the previous Conservative government had introduced the extension of nursery provision, extended maternity leave and promoted flexible working during the mid-1990s they maintain that the first formal government policy on family policy was not published as a consultation paper until 1998 (Supporting Families; Home Office 1998), implying that any real progress in the field of work life balance was due solely to the Labour Government and had little to do with the influence of (or the legal insistence of) the EU. Dex and Scheibl's research in 1999 was used to support the business case for work life balance, in that it could *"reduce absence due to casual sickness, and improved employee retention, productivity, morale and commitment"* (Dex & Scheibl 1999 quoted in Lewis & Campbell 2007 p369). During the Labour Government's first term in office in 1997-2004, family policies and the business case for work life balance were treated separately, and the business case was given apparent priority. During their second term the Labour government reversed the relative importance and highlighted the family policy side of work life balance. Lewis & Campbell (2007) noted that the joint position paper from the DTI and Treasury in 2003 implied that *"what was good for families was good for the economy"* (p369) but they did also acknowledge the difficulties involved in trying to meet the conflicting needs of families and the labour market. This change of emphasis in UK policy has implications for the wider definition of work life balance, in that the

concentration on family friendly policy and the desire to get women into the labour market while not neglecting children has usurped the business case for providing flexible working practices for all, and seems to have completely ignored the needs of older workers apart from labelling them as a problem. By 2004 the rights of the child and the family had superseded the needs of business, and the government then found it difficult to persuade business to provide flexible working on a voluntary basis. When the UK government finally signed up to the Social Charter, it had to pass legislation to extend parental leave. This opened the way for reformers to extend that legislation and the 2006 Work and Families Act now provides for longer maternity leave and statutory paternity leave and the right to request flexible working for a larger group of individuals. Nevertheless, despite these laudable actions, the UK as a whole remains a very unequal society in terms of gender, ethnicity, class and many other social measurements (Philips 2007). For example, some employers will not introduce work life balance policies aimed specifically at older workers, fearing that this would be contrary to Age Discrimination legislation, which it is not (Parry & Tyson 2009).

While governments have concentrated more on the family aspects of work life balance, academic research has been more evenly spread. For example Bloom et al (2007) conducted extensive research on management practices and work-life balance practices, by surveying 732 medium sized manufacturing firms in the US, France, Germany and the UK. Rather than limiting themselves to simply making the business case, their survey questioned whether work life balance was one of many benefits of a well-managed organisation, or whether it might come at the expense of productivity. Much of the reluctance to embrace flexible working practices in the UK has been due to the productivity argument, and yet Bloom (2007) found strong evidence that productivity is a result of sound management practices, and good management will make firms more

productive, and flexible working did not have a detrimental effect upon performance. National differences were noticeable: US workers enjoy less work life balance; French workers enjoy greatest work life balance. Bloom's research (2007) has particular significance as the economy shifts from boom to downturn, and it will be important for reformers to point to evidence to show that work life balance policies need not necessarily disappear as unemployment figures rise.

Rutherford (2001) suggested that Britain's long hours culture has a detrimental effect in that it prevents women from taking their place in the management structures of many organisations: quoting the 1997 Labour Force Survey and the 2000 Base line study on Work Life Balance, she holds that "*British employees work some of the longest hours in Europe. National data show that over one-quarter of full-time employees in the UK work more than 48 hours per week (Labour Force Survey, 1997), and ... 11 percent of full-time employees worked more than 60 hours a week (Institute for Employment Research, 2000)*" (Rutherford 2001 p.260). Looking at the working hours culture in several departments of two major organisations Rutherford (2001) noted that long working hours were implicitly expected of managers, and the more senior managers were expected to work the longest hours, although there was no contractual obligation to do so. While this was conceded that the desire to work long hours may be to deal with very heavy workloads, or from a sense of loyalty to the company, or from competition to gain even higher positions, Rutherford (2001) suggested that, knowing that women are generally less likely to be able to put in longer hours, the culture was somehow designed, or allowed to remain, in such a way as to serve the needs of male managers to avoid female competition for jobs at the top. She referred to the culture in one organisation: "*Senior directors were unconcerned about the length of the day, and indeed it seemed to be useful as a way of sorting out the 'men' from the 'boys', testing*

*their stamina and commitment*” (Rutherford 2001 p.273). While this research took place prior to changes in UK policy which permit employees to request flexible working, it is questionable whether the culture would have been designed purely to exclude women from senior management posts. However it does raise the question as to the effectiveness of UK policy if organisational culture that rewards long hours working with opportunities for promotion is so deeply ingrained. If work life balance is about a person having control of the conditions in their workplace, which somehow appear when personal life and paid work provide equal levels of satisfaction, then this could place too much responsibility onto “home” and negate what may be happening at work. For example, however good and satisfying and balanced life at home may be, adverse work conditions such as a take-over by a competitor, or a sudden downturn in sales or one of many other normal business world occurrences may tip the balance for an individual who feels that good work life balance is only there when all the circumstances are “right”.

In addition to independent academic studies, the UK Government carried out a series of research activities to provide baseline data for its new legislative provisions, the most recent of which, the final Work-Life Balance Employer Survey in 2007 updated findings from the two previous work-life balance surveys conducted in 2000 and 2002/3 (BERR 2007). The 2007 survey continued the trend of viewing work life balance as a families issue, and was conducted to co-incide with the introduction of the Work and Families Act 2006, although it was stated to cover a very wide range of issues relating to work-life balance, such as working hours, changes to legislation, employers’ attitudes to work-life balance issues, leave provision, as well as the more expected areas of support for working parents and provision and take-up of flexible working arrangements. It was designed to reflect the views of employers as at that specific time

and took clear note of all aspects of the practices within each of the 1462 employers surveyed. The general findings were that employers were happy to offer flexible working where it did not impact upon productivity. Clearly, as the economic climate changed those views may have hardened. Taking a practical operational approach, Langham (2003) suggested that the culture of long hours was exacerbated by presentism: the practice of needing to being seen to be at work for lengthy periods in order to demonstrate commitment to the employer. When people remain in the office till late, little work may get done but at least they look as though they are keen. The value that an organisation sets on mobile and home working indicates the extent that presentism attitudes are a problem. This does not lead to greater efficiency or effectiveness: he points out that other European countries may have shorter hours but higher productivity, and notes that many Swiss employers believe that people who regularly work longer hours are actually demonstrating that they are inefficient (Langham 2003).

The notion that UK workers work longer hours than workers in other countries has itself been questioned. Although popular wisdom suggests that people are working longer hours and in particular that full time workers in the UK work longer hours than their comparators in Europe, and that the same has been commented upon by American authors (e.g. Schor 1991), there is some evidence (Roberts 2007) that casts doubt on this thinking. Roberts (2007) cites the Office of National Statistics 2000 Time Use Survey to show that individuals overestimated their working hours and this was highlighted when they were asked to complete time diaries, particularly when aggregated with the working hours of part time workers, and he posits other sources of dissatisfaction with hours worked vis-a-vis work life balance. He suggests that there are a large number of variables that impact the perception of an unacceptably long working week, for example

the enjoyment of the job, the other activities to be fitted into the week, and who takes care of domestic and caring duties. So women who have considerable unpaid domestic responsibilities may not be spending excessive hours in paid work, and yet may well report time pressure. On the other hand, there has been a demonstrable increase in the working hours of managers with better education, and Roberts (2007) suggests that this group are more likely to either complain or to wear their long hours responsibilities as a 'badge of honour'. These people are also more likely to be able to afford to buy time through employing others to perform domestic tasks or negotiating holidays (Roberts, 2007, Bennett & Tang 2009). Those workers wearing their long hours with pride may do well to heed the Swiss example cited by Langham (2003) above, particularly as the working hours in the Fire & Rescue Service are considered to be long by several senior officers.

The economic downturn in 2008-9 and the ensuing recession of 2009-11 led to large scale cuts in public sector funding, scheduled to take effect over several years. These cuts required reduction in services as well as staffing but many public sector leaders attempted to make up the shortfall in staff numbers by simply expecting employees to work longer hours which fuelled industry's complaint that work life balance is not possible in a recession and that is a justification for insisting that employees provide 'more for less' (Bartlett 2009). So the current UK position is that work life balance issues are now to the fore, whether as part of a family friendly / child care aspect of government, or as a business case for increasing productivity, or even as a way to reduce compensation claims by employers. However, one of the difficulties that have arisen due to the piecemeal development of work life balance is that the term itself becomes problematic. It may be understood differently by academics, policy makers, trades unions, employers and by individual employees themselves. It therefore creates a



potential hazard for the researcher when asking questions such as where in a working life did issues of work life balance arise, and this is further considered in Chapter 5 on the Fire & Rescue Service.

From an organisational policy perspective, there are a number of organisational strategies that have been shown to be effective in improving employee engagement through improvements to work life balance and well-being activities. The most obvious policies are those that acknowledge the role of good management in the improvement of good work life balance, and that of poor management in the damage to work life balance. At the time of the research, only a limited form of flexible working practices were offered within the West Midlands Fire Service, and it could be that a wider interpretation of these policies, for example those suggested by the Employment Act 2003 and the later 2007 Work and Families Act would have an even wider effect.

Common kinds of flexible working across the public sector generally include:

- Part-time working. For example, an employee might start work later and finish early in order to take care of children after school – this is common in West Midlands Fire Service
- Flexi-time. Employees may be required to work within essential periods but outside 'core times' they often get flexibility in how they work their hours
- Shift-working. Shift-work is widespread in industries which must run on a 24-hour cycle, such as the emergency services and is used extensively in WMFS
- Job-sharing. Typically, two or three employees share the work normally done by one employee, although this is not seen generally within WMFS other than a few cases among non-uniformed roles.

Other recommendations are less common in WMFS for example:

- Working from home. New technology makes communication with office and customers possible by telephone, fax and email from home, car or other remote locations without creating managerial problems.

- Term-time working. An employee on a permanent contract takes paid or unpaid leave during school holidays
- Staggered hours. Employees in the same workplace have different start, finish and break times – often as a way of covering longer operational hours. This could counter some of the management objections of needing administrative staff very early or very late in the working day.
- Annual hours. This is a system which calculates the hours an employee works over a whole year. The annual hours are usually split into 'set shifts' and 'reserve shifts' which are worked as the demand dictates
- Compressed working hours. Employees work their total agreed hours over fewer working days – for example, a five-day working week is compressed into four days

It will be seen through the research whether national or organisational policies have had a beneficial impact on the work life balance issues of older workers.

Looking at the available literature on the development and definition of work life balance it is clear that there have been considerable improvements in the quality of working life for both men and women. These have been brought about by a combination of policy initiatives and legislation, and also by a growing realisation on behalf of employers that providing good work life balance opportunities can create measurable business benefits. However some employers have a strong organisational culture that may discourage the take-up of work life balance policies such as flexible working.

Moving onto the next area of literature, which is concerned with differences in perceptions in the various age cohorts, it will be suggested that while older workers often have very specific work life balance issues, younger workers are beginning to expect good work life balance as of right.

## **Chapter 3**

### **The Older you get.....**

There have been substantial changes over the past few decades in the way in which older people are viewed by society: there has been a greater recognition of the economic and political power of aging populations (Dychtwald 1999) and so historical experience alone no longer provides a key to today's circumstances. A person in their mid-fifties or early sixties in 2012 has very different priorities from someone who was that age in 1952. It now seems that biological age, i.e. the actual chronological age of a person defined by when they were born, may no longer dictate when a person makes their significant life choices and it may be more appropriate to think of social age, where an individual's age may be less relevant than the norms and behaviours of their social group (Settersten & Mayer 1997, Kooij et al 2008). So the question of whether older workers have specific work life balance issues may depend upon many factors other than chronological age (Sterns & Miklos 1995) and this can create challenges for life-course analysis when the issues may be of a very individual rather than a group nature. For example, the work values of individuals may change as they get older, but may not all change at the same rate, and this will depend upon individual circumstances (Smola & Sutton 2002). These different concepts of age were explored by Sterns and Doverspike (1989), who suggested a series of separate, but often interrelated, ways of describing age, the first being chronological age, i.e. the number of years old, which helps to distinguish older from younger workers, and which could be set arbitrarily at any age between 45 and 75. Functional, or performance based age, helps to explain how the aging process may affect one's ability to perform tasks or the extent of cognitive ability and memory. Psychosocial or subjective age is based on perception, i.e. whether

one is the oldest or youngest in a group, and the stereotypical expectations of other people of that particular age. Organisational age is based on the average age of workers within a particular organisation, and often refers to seniority or to loss of ability of required skills. Later studies among Canadian workers (Armstrong-Stassen & Lee 2009) have highlighted the importance of perceptions of an individual's chronological age relative to the perceived age of others within an organisation, which showed strong links to whether the individual felt valued, and therefore more motivated to continue working. This is of particular interest to the research into the Fire & Rescue Service, where uniformed staff have retired in their fifties, leaving a relatively small number of non-uniformed older workers employed until 60/65. Three relational age variables, all related to the perceived contribution that the individual made to their organisation, were considered in terms of HR practices and the individual person's sense of worth. The relational age variables were firstly perceived organisational relative age which was directly linked to HR practices, secondly perceived work-group relative age linked to training and respect, and thirdly perceived supervisor relative age associated with respect and fair treatment of the individual by the supervisor (Armstrong-Stassen & Lee 2009 p 1753) and this relates closely to the current research. The different aspects of how individuals and their employers perceive their age, relative to the rest of the organisation has implications for workers in all age groups. These are not the only ways of describing age but will serve to highlight the difficulties in simply defining an individual by their chronological age group.

### **3.1 Life Course – a theoretical framework**

In starting to explore the literature on aspects of age, ageing and retirement as they impact upon the work life balance issues for older workers, there was an initial, albeit

brief, temptation to divide the working life arbitrarily into very rigid age groups or cohorts, as though there were standardised transition points common to all but it soon became apparent from the literature that this would not be possible. While it might at one time have been acceptable to assume that people's life phases fell into fairly neat age groups, almost according to Shakespeare's Seven Ages of Man, e.g. starting work and getting married between 18 – 25, child care issues between 20 and 30, promotion issues between 30 and 40, retirement at 65 etc., (Uhlenberg 1996), that is not the case: some people have their children in their twenties, while others do so earlier, and yet others have children much later in life and so the issues for the family may be very different as a result. Providing economic and emotional stability for second and third families can also create different work life balance challenges for divorced and re-married parents and grandparents, as well as for employers (Morison et al 2006). Some individuals will start paid work at 16, and others may take a further 10 years to study and train before they seek employment, and others may face periods of unemployment and again their issues around work life balance, both at the time and as they progress through their careers may well be different. This chapter will look at three very loosely defined groups, younger workers, those in mid-life, and finally older workers to consider how issues of work life balance affect each of the groups, while fully accepting that any division between generations and cohorts are purely arbitrary, it then reviews issues of retirement.

Placing this review of work life balance within a life course perspective provides an opportunity to consider the whole working life of employees within the Fire & Rescue Service, from their initial decisions to join the organisation right through to retirement and beyond, and to understand how some of their earlier decisions and circumstances have impacted their current situation, particularly in relation to their work life balance.

Hutchison (2010) suggests that there are five key elements of the life course perspective:

- (a) there is continuity as well as change throughout the life course;
- (b) the age of a person may be measured as a biological, psychological, social or spiritual age;
- (c) people interpret the wider world through the lens of their earlier family life;
- (d) there is often a link between experiences as a child and those in later life;
- (e) people may make choices and construct their own life journey by reacting to the opportunities and constraints that currently face them (Hutchison 2010).

So life course analysts will look at how various events in a person's life have shaped their decisions, as well as how they have been influenced by their family and others close to them. This helps to understand how the person's life has changed or stayed the same, and how their current situation is often a result of the experiences and decisions they have made in the past. This is particularly relevant to the current research as the majority of employees in the Fire & Rescue Service tend to remain with the same employer for a very long period of time, with some people never moving to another employer, thereby ensuring continuity of employer but at the same time as change in type of role they perform. Some of the questions asked in the research questionnaire are about whether work life balance issues formed part of the decision to seek employment or remain in employment with the fire service, to consider whether earlier decisions had formed the later situations. The perception and measurement of age, whether chronological (the number of years since birth) or social (habits and behaviours relative to others in a social group) is changing as people no longer tend to remain within their stereotypical age cohorts (Settersten & Mayer 1997). Changes to the life course could also be the result of the way that the employing organisation has changed, and not simply due to a change within the family.

Cohorts, those groups of people born at roughly the same time and having similar life experiences (Settersten & Mayer 1997), have been of particular interest to life course researchers from theoretical backgrounds as diverse as sociology, psychology, social anthropology and social history (Pilcher 1994). Cohorts may be members of the same generation although their life course may have taken different directions. The term cohort was preferred by Pilcher (1994) in preference to Mannheim's (1952) use of 'generation' to describe the different age groups and how they behave and interact. Mannheim used the term 'generation' to describe a group of people who had experienced a particular historical event in a common way, depending on their age at the time, which gave that generation a shared view of those events that would be different to those of other generations. This shared view was, according to Mannheim, shaped when significant events happened to people when they were aged between 17 and 25 (Mannheim 1952). For Pilcher (1994), this meant that an individual's location in historical time shaped their social outlooks or world views; however she postulated that people of different ages would not be likely to share the same life course because they were also members of different cohorts, such as class or location.

The generational groups, which are mentioned throughout this chapter, are generally divided into Traditionalists, Baby Boomers, Generation X, Generation Y and Millennials, although the exact dates and ages of these groups tend to vary across the research.

While individuals within any one of these generational cohorts will inevitably make their life choices according to their individual circumstances, nevertheless the different generations do appear to have developed specific strategies for dealing with their circumstances (Pilcher 1994), and it is therefore appropriate to consider the work life balance issues of today's older workers in this light. While the experiences of today's generational cohorts will probably differ from those of earlier times, it is still useful to

explore the different generations as this may provide examples for comparison, as well as help to explain why today's older workers think the way they do.

This section of the chapter will now consider aspects of work life balance through the lens of age; using very fluid groups of younger people preparing for and starting work, those in mid-life, older workers and those who have retired, although it must be accepted that these divisions are arbitrary and may not even be helpful. None of these groups is homogenous; and the individual differences within each cohort can be greater than between them, however using the life course perspective allows consideration of each group as people transition through their working lives (Hutchison 2010). It seems quite possible that the work life balance facing the different age groups may be blurring, and the research may indicate that older workers' issues are broadly similar or wildly different to those of other generations. However, the exploration of the age groups will start with young people and progress along a logical timeline, so as to consider whether earlier decisions regarding career choice have impacted their later situations of work life balance when they become older workers.

### **3.2 Young People and Work Life Balance**

For the purpose of this research, it is proposed to start by examining issues facing young people as they start to prepare for work by undertaking vocational qualifications or training. The relevance of looking at younger workers when researching the work life balance of older workers is that career choice and individual circumstances in younger life may have a consequential effect upon a worker's work life balance in older age (Hutchison 2010) and this may be helpful to understand why individuals choose to join and remain in the Fire & Rescue Service, although it is fully accepted that the decisions



made by the young people of today will be very different and influenced by different factors from those who were young in the 1970s. Some young people move almost immediately into paid employment after leaving school, whereas others will seek further academic or vocational preparation, with entry into some professions as late as mid-twenties. However, those young people who continue their studies usually have to take paid work in order to finance their studies, or even just to live while they are studying, and this could adversely affect their academic success, although there is little definitive research to suggest that the costs outweigh the benefits.

Those young people just about to enter the workforce are sometimes defined as Millennials or Generation Y; born between 1979 and 1994, they are confident in using all aspects of new technology, social networking and many will have a real appetite for work although may not have as much loyalty to their employers (Smola & Sutton 2002 p 365). In areas of high social deprivation, young people may be discouraged by their parents from furthering their education, resulting in low paid employment. Some young people with behavioural challenges are pushed by their teachers into vocational training simply to get them out of school for a day or so per week, and this may have dramatic effects upon their readiness for work. For the purposes of this research the importance of the choice of career at school leaving age is to highlight the possible consequences of more difficult work life balance issues much later in the working life. For example, education and/or training is now compulsory to the age of 18, following the Education & Skills Act 2008, and yet it is not clear whether careers advice and training are truly impartial, or still heavily gender biased, as in the past. Furthermore, poor careers advice is unlikely to meet the needs of employers or of the young people themselves.

Young people in the UK are required to decide whether they should follow academic or vocational study, as these paths diverge during secondary education. As both schools and careers advisers appear to decide on a pupil's future based on their "intellectual ability" i.e. how well they adapt to academic study, the young people may have few real choices to make for themselves, and finally are often guided more by their parents' employment history than their own academic ability (Law 2004). Issues of social class, gender and ethnicity all play a significant role in limiting the choices that are available for many young people, and it has been claimed that careers advisers merely encourage young people "to accommodate their position in the pecking order" rather than alert them to wider career opportunities (Law 2004 p 43). This can easily lead a young person to make a career choice not on what they can do, but on what work might be readily available for them, and the implications for their later work life balance may never be considered (Green 2010). Poor career choices or lack of opportunity can lead to short term, casual work with few prospects. This lack of appropriate careers advice can lead to young people ending up in 'McJobs', low status work in the service industry, with few prospects for advancement (Lindsay & McQuaid, 2004). While such work can provide flexible hours, it is more likely to be flexible in favour of the employer than the employee, and frequently has limited opportunities for training and development. Given the insecurity of work in the service sector, particularly in times of economic uncertainty, some young people would prefer not to work at all, than work at minimum wage entry-level jobs with little chance of good work life balance. It must be noted however that poor careers choice is not solely a recent phenomenon: Ginzburg (1972) identified poor advice being given particularly to girls and minority ethnic students, and it is regrettable that this may still occur. This is relevant as the participants in the current research were young people making careers decisions in the 1970s and

1980s. While they are therefore bound to have different aspirations from the Millennials just entering the workplace, they were as different from their parents' generation as those of today's.

At the time of writing, the entry requirements for young people wishing to join the West Midlands Fire Service, the organisation on which this research will focus, do not specify higher level qualifications, although other parts of the emergency services sector, for example Police, are starting to consider this. The career structure for the Fire & Rescue Service tends to encourage all entrants to join at lower ranks and to work their way up, although graduate entry and direct entry from management roles in other sectors are now starting to be trialled in some Fire & Rescue Services (FRS). The lack of formal qualifications requirement may have implications upon the expectations and career trajectory of a new entrant to the FRS, as may the likelihood of attaining a satisfactory work life balance while working complex shift patterns.

For example, research into the perceptions of working for the National Health Service showed a large percentage of potential applicants expected high job satisfaction but low pay, long and inflexible hours, and hard physical work. The notion of work life balance was well understood but certainly not expected at entry level in the health sector (Coombs et al, 2003). However, young people are more likely than other age groups to expect to work hard in a rewarding environment (Smola & Sutton 2002). Some young people, frequently those from higher socio-economic groups, are found to actively consider work life balance as a reason for choosing a career path, such as dentistry, where graduates are keenly aware of income expectations, lifestyle and required levels of commitment (Gallagher et al, 2007). However, even students aiming for a professional career had to acknowledge the "potential for boredom" and the feeling of

being on a treadmill inherent in many routine tasks in an otherwise attractive career. Much seemed to hinge on whether students were considering their short term or long term goals as to whether they intended to stick to their chosen career path (Gallagher et al, 2007). Where young people have social expectations it may be that they will seek work with greater social interaction, whether face to face or digitally (Smola & Sutton 2002). However, the career choices made by young people today or in the past are not irreversible: *“Our reformulated theory is that occupational choice is a lifelong process of decision-making in which the individual seeks to find the optimal fit between his career preparation and goals and the realities of the world of work”* Ginzburg (1972). And this resonates with the life course assumptions that people make decisions according to the circumstances in which they find themselves as much as their past decisions or their family history. It is also relevant to the Fire & Rescue Service participants, insofar as the reasons for career choice of people entering the fire service, and whether expectations of working hours and work life balance may have formed any part of their choice. It also offers the opportunity to consider the life-course question of whether experiences or expectations of friends and family influenced that career choice.

### **3.3 Mid-life workers and work life balance issues**

Those born between the 1960s and the 1980s are often referred to as Generation X (Kupperschmidt 2000) and are typified as being good problem solvers, comfortable with using technology, adept at multi-tasking, and more willing to accept diversity (Smola & Sutton 2002). For these Gen-Xers, there will be many times when work-life balance can become an issue, and these times may be linked to key transitional moments in the work life, such as promotion, training, or changes in work practices. Many of the middle managers in the Fire & Rescue Service are in this group, and may

be able to identify the link between transitional moments and their work life balance. Key pressure points could occur at the start of employment such as recruitment and selection, induction, training and promotion of individuals, where there may be additional stress in wanting to achieve, as well as when they have achieved management status.

Although there is a general perception that flexibility is a good thing, many young professionals of both genders have reported dissatisfaction with the increased integration between work and non-work, which is defined as comprising “all aspects of an individual’s life outside their paid occupation” (Wilson et al, 2004 p187). Lawyers and management consultants in their late 20s and early 30s appeared to seek a greater distinction between their work and non-work, although gender differences started to surface when they became parents. The researchers were surprised to note that many in their sample, albeit a relatively small sample, did not prove to be more efficient or effective when working “in any place at any time” (Wilson et al 2004 p194). Greater reliance on boundaries between work and non-work might help, despite a widely held assumption that younger people are happier to embrace technology and are keen to work more flexibly. There is also an assumption that increased productivity can only be attained at the cost of reduced work life balance. However, this again is not necessarily the case; as there are many examples of well-run organisations that are both more productive and offer better conditions for their employees (Bloom & Van Reenen, 2006). This research considers whether the Fire and Rescue Service is one such organisation.

The work life balance pressure points of mid-life workers may be particularly problematic if they are coupled with a sense of disillusionment, insecurity caused by

skills obsolescence and disappointment at lack of career progression, which can sometimes cause mid-life managers and supervisors to become a liability rather than an asset for employers (Morison et al 2006). While enlightened employers will work with such managers to encourage mentoring or new assignments, others may be unprepared for a growing number of disenchanted managers who can hinder organisational productivity. Morison et al (2006) suggest that many employers concentrate only upon their key talent, and neglect the unhappy midcareer managers at their cost.

Understanding the different work values of Gen-Xers will help a manager to improve motivation, productivity and corporate loyalty (Smola & Sutton 2002). Similarly, Gen-X managers who understand the different motivations of older workers are likely to have significantly more productive teams and retain experienced workers for longer (Leisink & Kneis 2011). The role of the manager in either improving or damaging the well-being and work life balance of their team members is crucial, and yet may not be recognised in many organisations (Tepper, 2000 Hogan, Curphy and Hogan 1994, Kelloway & Barling, 2010). For example, understanding the difficulty in arranging childcare, or agreement to offer flexible parental leave are likely to play a crucial part in the decision whether to move into management roles or into self-employment, as for example in the Police, where certainty of shift arrangements changes on promotion to the role of Inspector, when much greater flexibility is required, making it very difficult to combine that role with planned parenting responsibilities. In the Fire Service middle managers and main grade fire-fighters work predictable shifts, but senior officers are required to work more flexibly, and to be on call at evenings and weekends, which makes it harder to arrange childcare. Equally, managers may not understand that the work life balance pressure points may be linked to the individual's own personal life, such as marriage, children, moving home, health issues, caring for elderly parents.

The UK care policy agenda, known as Every Child Matters, is dominated by childcare; however large numbers of people in this mid-life cohort also provide unpaid care for adult relatives, friends or partners. The right to request flexible working has now been extended to those with adult caring responsibilities; however this remains something of a Cinderella issue in policy terms. Demographic change means combining work and caring is likely to become more common. Vickerstaff (2005) notes that some far-sighted organisations provide a very wide range of flexible working options to cover parenthood, caring responsibilities, even the return of loved ones from military service overseas, and that such employers report a tangible benefit from doing so: *“Not only do flexible hours mean we can attract a wider range of employees, but it also means that staff are more committed to their jobs, which reduces absenteeism and improves morale and retention”* (Tesco, quoted by Vickerstaff 2005 p.8).

In mid-life, work life balance becomes a very crucial issue for nearly all adults, whether they are part of a family group, or whether they have caring responsibilities for children or older parents or no-one. Regardless of family commitments, individuals frequently complain of the increased pressures of work, and of having to be seen to demonstrate loyalty to the organisation through working excessively long hours (Thomas & Davies 2002). Work family conflict apparently declines across later midlife and later adulthood, with older workers reporting higher levels of positive spill-over between work and family. When work family conflict is reported it is significantly and negatively related to career satisfaction and lack of training opportunities. But are the inequalities of women caring for children within home and family life that have been reported over the past few years still the predominant view in the UK? Recent research by the Equality and Human Rights Commission (2009) found *“... a strong case for re-configuring maternity, paternity and parental leave and extending flexible working.*

*These measures would respond to high demand from parents and the wider working population, achieve greater equality, fairness and choice, improve the quality of life and of childhood, and provide benefits for employers and the economy.” (EHRC 2009, p12)*

If their choices are still dictated by old fashioned views of who should work and who should care for children and the home, or by business owners who will not offer truly flexible working conditions, or by inequalities in maternity and paternity leave arrangements, then men are being prevented from taking their preferred share in parenting just as women are being prevented from reaching their potential in the workplace (EHRC 2009).

However this debate is not solely about families and parenting arrangements; the traditional family with two parents and a number of children is a very small percentage of the UK population (Ransome 2007). The debate is also about how an individual can gain fulfilment and balance between their paid work and whatever other activities they feel are a priority for them, and particularly as they move towards the end of their working lives. Again this is subjective and therefore more difficult for some employers and legislators to understand. Furthermore, the situation may be affected by the individual's psychosocial and organisational age and so that again will add a level of complexity for employers to manage (Sterns and Doverspike 1989).

This is not to say that there are not voices raised against the universal introduction of flexible working: for the individual it may be the dangers of isolation and the temptation to work all hours or never switch off from work. For employers, the re-organisation of the workforce and working practices may not be cost effective in a time of economic downturn. For example, employers may face increased costs involved in administering the scheme; if their premises are open longer, there may be increased costs for lighting



and heating; and employees will not be in work at certain times and therefore it may not be suitable for organisations where continuous cover is necessary. Goulding and Kerslake (1996) suggest that the effective use of flexible workers necessitates the wholesale updating of management techniques and organizational strategy, which many employers would be reluctant to embrace (Goulding & Kerslake 1996, p13). There is also a suggestion that flexible working practices that benefit the employer more than the employee can lead to health problems for employees (Costa et al 2004).

Far from a feeling of disenchantment (Morrison 2006), some mid-life workers find particular difficulty in balancing the cost of high achievement with the loss of work life balance. Single-minded determined effort to reach the top of a given profession can lead loneliness, family difficulties or even to early burn-out. This has been noted for many years, especially among the public sector professions such as health, education and social work (Freudenberger & Richelson 1981) but in the private sector the creative industries seem to have found ways to encourage high achievement without burning out their workforce (Pollitt 2007). Some of these ways border upon the completely obvious, such as involving individuals in the running of their company, demonstrating care and concern for their welfare, and paying the industry rate for the job, but others involve using creative and fun activities to diffuse stress at work. Traditional professions, such as the law and accountancy, find putting their work life balance policies into practice particularly problematic; Lightbody (2008) notes that accountants, for example, are expected to work hard and play hard, so that work life balance requires supreme effort to excel in both work and home domains, and has little to do with the well-being of the individual. Even when employers and legislators do work to ease the work life balance burden, the benefits of action may not be felt equally by all workers. For example, the reduction by the French government in the working week to 35 hours maximum was

later found to have benefited the middle class and wealthy, who have more control over the hours they worked, far more than less advantaged workers who often worked non-standard hours and had very little control over their working conditions (Fagnani & Letablier 2004).

This all suggests that work life balance can become an issue throughout the mid-career, with highs and lows occurring randomly and unpredictably as a result of life events, such as children, divorce, or work re-organisation. These occurrences may be an anticipated part of the life trajectory, and then it is the reaction to that event that may be governed by past occurrences in the life of the individual. However, as work life balance is such a subjective experience, it is almost inevitable that individuals will choose to react differently. The challenge faced by this research is whether the work life balance issues facing older workers are different from those faced by those in midlife, or whether those simply extend into the older working life, and remain until retirement.

### **3.4 Older workers**

Those older workers approaching and transitioning through retirement now are often referred to as Baby Boomers, as there was a baby boom following World War II. They were born between the 1940s and the 1960s and have enjoyed post war prosperity and have grown up with a feeling of entitlement to the best that life can offer (Kupperschmidt 2000). Their exposure to political scandals such as Watergate in the US and the Profumo affair in the UK has resulted in a cynical disrespect for authority, although in the workplace they often continue to work hard (Smola & Sutton 2002). Older workers in the UK are often said to be over 50. In some parts of Europe 45 is considered to be old for gaining new employment, particularly for females.

Do the challenges of maintaining a work life balance become easier to manage as retirement starts to loom? It would seem not. Many individuals may, for a variety of reasons, elect to continue working long after the State Retirement Pension becomes payable (over 65 for men and up to 65 for women in the UK rising to 66 by 2020). So to speak of an age group of 50 – 70, or even 50 – 75 (Yeandle 2005) as if it were one homogenous solid group of people all with similar needs and attitudes is unrealistic and unhelpful (McNair 2006). To span a generation is to over-generalise the needs, aspirations and challenges facing a huge cohort of individuals. This is why the concept of social age may be much more useful when discussing work life balance (Sterns and Doverspike 1989, Settersten & Mayer 1997, Kooij et al 2008) and perceived relative age (Armstrong-Stassen & Lee 2009) will also affect perceptions of work life balance for older workers. Given the fact that many operational fire-fighters have traditionally retired at 50, as their pension arrangements have encouraged, this research will focus on workers aged 45 plus, in order to question the issues facing that specific group. Of course, non-operational staff such as administrators work under a contract to the national pension age, and so this research will enable consideration of the latter half of the working lives of that group.

Some individuals may wish to continue working at the same pace and for the same hours right up until the date they retire, while others may wish to ease themselves into retirement by gradually reducing their hours (Calvo 2009) while increasing either their leisure time or self-employment where they may exercise more control over their time (Ginn and Fast 2006). Frankel and Picascia (2008) considered the widely-held view among employers in the US that workers in their final five years of work can be unproductive and can become a liability, despite the fact that many companies have no knowledge management systems in place to ensure that a lifetime's experience and

expertise does not just walk away at retirement. A culture where there is an over-riding assumption held by younger employees that older workers are just cruising to retirement will naturally de-motivate both age groups. The importance of managing perceptions of organisational age cannot therefore be over-emphasised (Sterns and Doverspike 1989). Relatively simple solutions such as establishing a mentoring scheme, or using the repertoire of expertise of older workers through advisory committees, have yet to be introduced in many organisations, although they have been found to be very effective (Frankel & Picascia 2008). This could be a way of minimising the issue of work life balance towards the end of the working life while meeting the needs of employers for succession planning and knowledge transfer. Not all older workers relish the notion of retirement, with its sudden cut-off of social interaction and potentially a drastic reduction in income (Vickerstaff 2005) and some may seem to fear the “cliff edge of retirement” whereby all the known support of colleagues and a steady salary suddenly end.

A number of Government policies have attempted to increase the number of older workers actively engaged in the workplace, and these include the introduction of the age discrimination legislation and the Age Positive campaign, to provide advice to employers to encourage them to retain their older workforce. The Government clearly believes that *“the key to extending working life is flexibility in working arrangements, retirement age and access to pensions while still working”* (EHRC 2009a p iv).

However the evidence is that full time work among the over 50s has been very much lower than other age groups (EHRC 2009a) (although that may change as the current recession continues to impact the labour market). However, when employers view the management of older workers as a problem, and take a reactive rather than a proactive approach, they risk losing the valuable repertoire of knowledge and skills that those

employees can offer (Vickerstaff 2005). It should be possible for many employers to re-engage and re-enthuse their older workers to continue to make a valuable contribution until they do finally retire (Leibold & Voelpel, 2007). Even those older workers who feel disempowered by virtue of their age relative to others in the workplace can be encouraged to participate and re-gain their place with the workforce (Dweck & Molden 2005).

Working part time has become increasingly popular with older workers (Bohle et al 2010), particularly among older women (Loretto, Vickerstaff & White 2005). This may have more to do with a reluctance to continue to work at full stretch and less to do with equal choices; for men who have worked for many years to save for retirement, then retirement is seen as an earned right, and delaying retirement for financial or personal reasons may seem to be unreasonable (Davey and Davies 2006). However women often have interrupted work histories and as a result lower pensions, and then they may have little choice but to continue in paid employment (Loretto et al 2005). It is also clear that older respondents have a less idealised view of work (Smola & Sutton 2002) and may be less willing to work excessive hours. This may also be due to whether they perceive themselves as having a good quality job or good quality work life balance as discussed by Gallie (2002) and Pena-Casas (2007). The issue of what is a good job and whether that perception impacts upon work life balance is one aspect of this current research. Some individuals in the later stages of their careers may seek to shift their “life-work balance” away from long hours of paid work (Ginn & Fast 2006, Bohle et al 2010), with a significant proportion of full-timers preferring part-time employment,. This can of course only happen when an individual’s pension entitlement is not adversely affected by reducing their working hours just before retirement, for example in the case

of a final salary pension scheme. Such schemes have fallen out of popularity since the 2009-2011 recession, and therefore this may be less of a problem in the future.

Issues of health and fitness to work, especially for those working night shifts, can become increasingly difficult for older workers (Koller 1983, Harma & Ilmarinen 1999, Bohle et al 2010) and the tiredness experienced by older shift workers in the Fire and Rescue Service could significantly affect the individual's perception of their own work life balance. While Skinner et al (2010) suggested that those most at risk from poor health following shift work are actually slightly younger men in their forties; this should not detract from the personal experience of firefighters who have worked on variable shifts for the previous twenty five years. Research on the effects of rotating shift patterns on older workers (Brown et al 2009) suggests that forward rolling according to circadian principles i.e., start with an early shift, followed by a late shift and then by a night shift is preferable to backward rolling, i.e. starting with night shift, then late, followed by an early shift. It is this forward rolling pattern that is often adopted by West Midlands Fire Service, and yet the respondents frequently cited shift working as making them tired as they got older.

Are there gender differences between the older workers' attitudes towards work life balance? This is certainly a question to be explored in the current research. Certainly the percentage of older female workers now working flexibly or part time has increased (Bisom-Rapp et al 2011) but it is not clear from the research whether that is through preference or circumstances – in times of recession it may be that there is simply less full-time work available. Women's attitudes within the older age group (particularly among those of a deeply religious persuasion) did appear to be still dominated by the belief that family should come before a career for women (Jensen 2006), but again it is

not clear from that research if that view was more widely held across the population, or even the same across different professions. Research among medical practitioners of differing age groups, for example, suggested that older workers felt that work and family domains should be kept independent whereas the younger workers were more insistent upon flexible working and not being exploited at the expense of their family and social life (Jovic et al 2006). This was not the view held by all researchers as noted earlier in this chapter (Wilson et al, 2004). There is sufficient evidence however (Jovic et al 2006) to suggest that the generation approaching retirement now has less chance than earlier generations of gaining satisfactory work life balance because it was never an option when they were younger. This is a question worth exploring further in order to ascertain where the work life balance issues arise, and what the long term implications are of these expectations, and this links to the further question as to the expectations of life after retirement.

Many older adults combine paid work with elder care and this impacts on their work life balance (Lewis et al 2003); respondents occupying the dual roles of caregiver and employee report more depression symptoms than those occupying either role alone (although this dual role is just as likely to occur in mid-life). Negative implications in combining these two roles were more pronounced for women than for men; wives' transition to care giving was associated with increased psychological distress, but for husbands the transition into care giving was significantly associated with increases in personal growth. Findings suggest those who are involved in many different activities whilst in employment are quicker and more able to adapt to change after redundancy (Blossfeld & Hofmeister 2006) whereas those who simply went out to work and had few hobbies found it difficult to adjust. This agrees with Vickerstaff's study (2006) finding that older workers often feared retirement. However that 'fear' may be the

result of simply not knowing what retirement will be like; while people do not expect it to be the same as for their parents' generation they may not have many close friends or relatives who are retired, and who can act as exemplars or role models for a happy retirement. Goodwin and O'Connor (2012) suggest that many people have little idea how much money they will need to live, and some have a very unrealistic view of a retirement filled with leisure activities and travel and yet have made few financial plans to ensure this is possible. Hence the fear of retirement being linked to the sudden cessation of social interaction and regular salary income (Vickerstaff 2006).

A further significant issue is the way in which patterns of employment for older workers appear to be as gendered as they are for younger workers (EOC 2006). Women are in the majority for over 50s and especially for the over 60s, and yet there are fewer older women in employment, particularly in shift-work situations. Women comprise 72% of older part time workers, which may be as a result of increases in flexible working practices or a deliberate reduction in hours to prepare for retirement, or may simply be that older women are less able to secure full time employment. Here again it is impossible to take a whole group and reach an overarching judgment about where the work life balance issues are to be found in the working life as 'older workers' are not a homogeneous group.

A further factor influencing work life balance is that of job satisfaction (Davey & Davies 2006), lack of which can lead to a marked deterioration in both physical health and emotional well-being. Comparing the results of their study with that carried out by Cherrington et al (1979), Smola and Sutton (2002) suggested that it was possible to show that older workers consistently have a lower desire for promotion, and yet had a greater unquestioning loyalty to their employers. At a time when some people are



seeking a less physically demanding job, the experience of age discrimination and lack of understanding can quickly demotivate older workers from continuing employment. This is particularly so when employers believe that older workers are a “problem” that has to be managed, rather than a benefit to the whole workforce (Davey & Davies 2006). This was further discussed in the Canadian study of perceived relative age being a factor for motivation (Armstrong-Stassen & Lee 2009) and as such a likely indication of perceptions of work life balance. The sense of worth of an older employee may be affected by their age relative to the perceived ages of other workers in the organisation, so if there are many older workers in an organisation, and if the organisation’s HR practices are good, then the individual will more likely have a greater sense of worth and be more highly motivated as a result. It follows that the isolated older worker, in an organisation with poor HR practices may well feel low self-worth, leading to demotivation and a perception of poor work life balance (Tepper 2000). A further dimension was that of the perceived age of the supervisor relative to the individual older worker; if there was a large age gap then the older worker may feel unsupported and disrespected within the organisation, again leading to demotivation and subsequent perception of low work life balance. Good management with effective use of HR policies geared to the whole workforce will have a transformative effect (Armstrong-Stassen & Lee 2009).

Why do many older workers leave the workplace before their statutory pension becomes payable, and is the decision linked to work life balance? And does this situation also apply to the Fire & Rescue Service? Older workers can be said to leave work for either voluntary or involuntary reasons; the voluntary reasons may be exercising choice to take early retirement, where individuals are in the somewhat enviable financial position of being able to leave or stay as they wish (Irving et al 2005).

Involuntary reasons include redundancy, organisational restructuring, personal health issues and caring requirements. Some older workers may quickly re-enter employment with the desire to do something very different, and perhaps to follow more altruistic pursuits (Maestas, 2010). Others, who do not have financial security, often find ways to gain other employment in a changed role or on a part time basis simply to make ends meet. DWP research (Irving et al 2005) concluded that exercise of that choice to go or stay often seems to depend on whether individuals felt they had planned sufficiently for retirement by contributing to a pension. However the sudden need to finish work in order to take up caring responsibilities (Loretto & Vickerstaff 2012) or deal with personal illness raised the issue for many respondents of the adequacy of provision of flexible work opportunities within their workplace, particularly as a viable alternative to having to retire before they had planned to do so.

While older workers themselves may wish to continue working, and it certainly appears to contribute to well-being in many cases (Robertson et al 2003), employers' attitudes can sometimes be the main factor why they exit prematurely (McNair 2006). McNair (2006) suggests that there is a need for employers and legislators to provide flexible work opportunities for older workers who choose or need to stay in work up to and, in some cases, beyond the usual retirement age. He cautions against the prevailing view that older workers are a homogenous group, and cites three distinct groups of older workers: 'choosers', 'survivors' and 'jugglers'. Choosers are well qualified and highly motivated workers, often in managerial roles, who could contribute to the workforce for many years to come. However, they often face barriers of discrimination from their employers, whereupon their response is often to retire and take up voluntary work. Survivors are less well qualified, less motivated, and more likely to exit early due to redundancy or ill health. The final group are jugglers, mainly middle managers, mainly

women, and often unable to continue working due to caring responsibilities. McNair's (2006) argument is that policy changes and enlightened management practices could enable all three groups to continue working and contributing to their organisations for longer.

While notions of work life balance are clearly applicable to those below the statutory pension age, it is now appropriate to consider the work life balance issues of those who are working beyond what could be described as normal retirement age.

### **3.5 Retirement Issues**

Within traditional life course analysis, it could be argued that work life balance does not apply to retirement as there is no further 'work' to be balanced, but the changing nature of retirement, and many people's return to the workforce following a retirement event, means that this is an important aspect, particularly in the anticipation and preparation for retirement by older workers. Looking at retirement from a life course perspective this can be seen as a transition or a major incident, and a person's well-being following retirement can change the further through the process the individual finds themselves (Kim & Moen 2002) and this will be considered in the findings. Experiences may be gendered, and may differ according to whether there are "linked lives", i.e. a supportive spouse or other family members would be likely to improve the experience of well-being. On the other hand, the release from every day work pressures can create feelings of well-being and happiness, particularly for those whose work life balance did not seem to be satisfactory. Retirement was once thought of as a one-off occurrence (Lockenhoff 2012) but is now accepted as a much longer process, where individuals may transition between work and non-work several times before they completely finish all paid work (Warner et al 2010). The receipt of occupational or state pension is no

longer an indication of retirement as many people may be in receipt of state pension and still interested in paid work (McNamara et al 2011).

Older uniformed workers in the Fire and Rescue Service are less common because their pensions were predicated on a 30 year contribution record, which meant that they generally retired in their 50s, but non-uniformed workers employed under local authority contracts were expected to work until state pension age and therefore had a different view to the approach of retirement. (This research was conducted prior to the abolition of the Default Retirement Age, although the pensions industry was already warning that individuals would have to contribute for more years in order to gain a pension.)

### **3.6 Planning for Retirement**

Given that retirement is an important step for most people, many seem very reluctant to plan for their retirement. Foster (2011) suggests that many people believe themselves to be too young to worry about their retirement and so put off planning until much later in life and some simply fail to make any plans at all. While those working in the Fire & Rescue Service are in either the Fire Service Pension scheme or the Local Government Pension Scheme, and having a pension is important (Irving et al 2005), there is more to retirement planning than just finance. Yeandle (2005) found that planning how the retirement process would occur and what to do after retirement was an important indicator for the long term health of the retiree. As this is such an important transition for most people (Moen et al 2000b), financial and life planning for what to do following retirement enables people to move into the next phase of their lives more effectively. The importance of adequate planning was highlighted by the Cornell Retirement and Well-Being Study which found that many retired people regretted not having done

enough planning for their retirement (Moen et al 2000). There is a body of opinion (Reason 2008, Heffernan 2010) that people chose not to think about the future, or the consequences of their choices, preferring to believe that nothing bad will happen to them and ‘everything will work out all right’. This could contribute to the decision (conscious or otherwise) not to plan.

However some plans that are made are simply unrealistic in terms of available finance or likely activities to be pursued following retirement. Goodwin and O’Connor (2012) suggest a reworking of Norbert Elias’s 1962 model of transitioning into work (Elias 2000), to explore some of the problems faced by older workers as they transition out of work into retirement. These include the ambiguity of the social role of ‘the retired’, separation from those still in work, and an increased dependency upon family members following a reduction in income. This is in sharp contrast to the perception of many retirees that their retirement will include much relaxation and leisure, even though the income required to fund such a lifestyle simply would not be available to many (Goodwin & O’Connor 2012)

What sort of planning could be done that might improve well-being and work life balance post retirement? Certainly individuals are being encouraged to take a more proactive approach to their financial planning (Clark et al 2010), with the Government changes in State Pension Age and the poor performance of the stock market emphasising the need for saving for retirement (Budworth 2009). However the need is not simply financial (Yeandle 2006) and could include planned holidays, voluntary work, further study or a variety of other activities to replace the loss of social interaction, status and challenge of the paid job. This additional aspect of retirement

planning is discussed further in Chapter 5 about the Fire & Rescue Service, and in Chapter 7 regarding retirement issues.

### **3.7 Approaching Retirement**

The period prior to retirement seems to carry many points where work life balance can become an issue. Older workers may be seen as an asset or, more likely, a problem (Sterns and Doverspike 1989), and this perception can impact on their work life balance. This is a particular time of a working life that merits greater research, particularly in an organisation such as the Fire Service, where uniformed officers have traditionally retired in their 50's, although non-uniformed staff work through to state pension age. This situation is now changing due to new employment legislation, as well as several changes in firefighters pensions, and uniformed officers are now being encouraged to remain at work for longer. More and more people expect to work past retirement (Warner et al 2010) whether for interest or for financial reasons, however there is still a general desire to retire early if at all possible (Shultz & Wang 2011). There is a smaller chance of early retirement for women, as they are more likely to have had career breaks or lower paid work, reducing their potential income in retirement (Holden & Fontes 2009).

While some workers do look forward to retirement, there are many who fear the 'cliff-edge' nature of working full time and then suddenly finishing work and losing the security of salary and companionship (Vickerstaff 2006), although Calvo (2009) suggests that post retirement wellbeing is considerably improved by a sudden finish as opposed to easing gently towards retirement by a gradual reduction in hours. This can also be improved by adequate financial and lifestyle planning, although this is something that many people seem reluctant to do. However, the decision as to when to

retire has often been problematic, for example, even where individuals did not have a mandatory retirement clause in their contract, employers often had 'normal' retirement ages with line managers to a large degree controlling who was allowed to continue working beyond this (Vickerstaff 2006). This fear of retirement as somehow unknown and uncertain may contribute to a tendency to underestimate the finance needed to fund a comfortable retirement and lead to a lack of planning (Goodman & O'Connor 2012). Those fearing retirement may be more likely to respond to questions using metaphors of loss and threat (Sargent et al 2011) whereas those who do not fear the cliff-edge (Vickerstaff 2006) may use metaphors of transformation, opportunity and new beginnings (Sargent et al 2011).

This research, in considering the work life balance issues faced by older workers, will explore the impact of the ways in which Fire & Rescue Service staff were planning for retirement in Chapter 7, Retirement Issues.

### **3.8 Transitioning through Retirement**

Well-being at or shortly after retirement may have little to do with age, being more affected by whether the individual is able to exercise control over when and how they retire (Calvo 2009). So, for example, the individual who is involved in the decision as to when to retire, and maybe receives advice on pensions and other retirement matters, may find adjustment to the state of retirement much easier.

Those individuals who have just retired would still be in the Baby Boomer category (born post war, between the 1940s and the 1960s) and would have been young workers at the time of Cherrington's survey (Cherrington 1979). This makes it possible to consider whether their attitudes to work and work life balance have changed with

maturing years (Smola & Sutton 2002). Of course, these attitudes may be due more to influences of their peer group than to some form of maturity, and the issues of chronological vs. social age are also relevant (Sterns and Doverspike 1989). A further issue arises when considering whether an individual describes themselves as 'retired' or 'partially-retired' as many retirees return to the labour market after their official retirement (Maestas 2010), in which case Crawford's (1971) theories of retirement seen as a disengagement from the world of paid work into a world of increasing isolation from the 'still working' may not be at all relevant for retiring Fire-fighters or even those in non-operational and non-uniformed roles.

The decision of whether to retire gradually or to take sudden action may have a direct impact upon the well-being of the individual after their retirement. Conventional wisdom seems to suggest that gradual retirement will lead to a happier life, with employers seemingly willing in some circumstances to allow a flexible job design for older workers to ease them out of the job gently while harvesting their accumulated knowledge and wisdom (Yeandle 2006). Partial retirement, where an individual returns to work part time for their previous employer can be a way of easing into full retirement, although employers are likely to pay lower wages to such returnees (Maestas 2010). This type of employment that happens after a person's retirement and before their complete withdrawal from paid work is often called bridge employment (Kim & Feldman 2000). The success or otherwise of such bridge employment will often depend upon whether the employer has developed a strategic response to their ageing workforce, and has developed sympathetic HR policies to deal with its older workers (Armstrong-Stassen 2008).



It is of course difficult for an individual worker to make the decision as to whether to ease into retirement gradually or stop work suddenly, as they have no personal experience of either path on which to base their decision. Calvo et al (2009) found to their surprise that sudden retirement actually created a more fulfilling retirement than a gradual reduction in hours or responsibilities. However they did acknowledge that it may be that simply having a decision to make, rather than having retirement thrust upon them, that will enable the individual to enjoy their retirement years (Calvo et al 2009). Some workers retire and then return to work, and this may be due to perceived lack of finance, a need for activity, loneliness or a variety of other factors but, whatever the reason, 'unretirement' is becoming more common (Maestas, 2010) and many older workers have already made the decision to work in retirement to prevent a sudden break of the life that they knew (Calvo et al 2009). Uncertainty over pensions has become an increasing worry for older people in the current recession, with many people feeling unable to retire, or discovering that they cannot afford to live on a pension and therefore seek to return to the work-place (Maestas 2010, Sargent et al 2011). Some employers are happy to take back retired workers who still have knowledge and experience to impart to younger employees. Prior to the recent introduction of age discrimination legislation, many fire officers who had retired at 50 were then re-employed on annual contracts to carry out specific projects for the fire service. Some of those returnees have now been re-employed permanently and this research will consider whether they have work life balance issues specific to their group. While there is a general reduction in hours worked by older workers, there is a significant proportion of men who are drawing a pension but not yet aged 65 who are more likely to be working part time (Herz 1995). Maestas (2010) suggests that un-retirement is more frequent among those

who retire in their early 50s, and much less frequent among those who do not retire until their 60s, and this research will seek to test that suggestion.

Of course, returning to work after retirement does not just benefit the employee; employers have been happy to get back skills and experience, particularly at times where there are shortages of good employees (Herz 1995) although the semi-retired worker is likely to be first to face redundancy at leaner economic times. Kim & Feldman (2000) found that the more money an individual had at the age of retirement, the less likely the individual was to take a bridge job, and many wealthy retirees gained similar job satisfaction by taking on voluntary or community work (Kim & Feldman 2000 p 1206). Whether the individual retiree needs as much time to adjust to their new status as they anticipated depends upon their pre-retirement situation; so younger, well-off, middle-class, white collar workers report no problems in taking a sudden retirement and will not wish so readily to return to the job market (Calvo et al 2009).

Issues of work life balance appear at all stages of a working life, and the literature suggests that good advice, forward planning and effective management practices can play their part in assisting an individual to navigate their way through those issues. Of particular interest here is the latter part of the working life, when childcare and family needs may be receding and being replaced with caring for elderly parents, and when retirement is starting to concern the employee. Simply introducing pre-retirement advice sessions for older workers may not, in itself, address the policy needs for those workers who are yet undecided about how and when to retire. Those individuals who are heading towards retirement have their own issues, and it is those issues that receive further exploration in Chapter 7.

## **Chapter 4**

### **Methodology**

#### **4.1 Introduction**

The purpose of this research is to identify the work life balance issues faced by older workers in the Fire & Rescue Service using a combination of qualitative research principles that can enable exploration of individual participants' perceptions. The Fire & Rescue Service contains within it different groups of workers, on different contracts, with different retirement arrangements, and with different responsibilities and therefore provided an opportunity for comparisons. Having identified the work life balance issues experienced by older workers, the next stage is to consider the impact of organisational and legislative policies and initiatives on the well-being and work life balance of those older workers. It may be that some work life balance issues are specific to that age cohort, and others may be experienced by workers of all ages. As stated in the previous chapter, despite the fact that the majority of writers consider older workers to be over 50, the age group under consideration here is 45+ in order to take account of the experiences of workers who intend to take early retirement at 50 – 55, in addition to those who intend to retire later. This age group, of 45 and over, is worthy of further investigation from a life course perspective as there are issues of physical and mental well-being, particularly for those working shifts and, for some, of caring for children and elderly relatives; there are also issues around the perception and treatment of older workers by their colleagues and managers, as well as the type of retirement planning undertaken, all of which may impact upon their wellbeing. This is particularly timely as, following the recession of 2008-2011, the public sector in the UK faces stringent and long term financial cuts which will inevitably impact upon the working conditions of

remaining staff by expecting more work to be carried out by fewer workers (Bartlett 2009). This intensification of work is likely to affect many branches of the public sector over the next few years.

The research question has inevitably changed over time, mainly as a result of the literature review. The original idea had been to consider those points in a working life when work life balance would become an issue, and the plan had been to ask individuals of different ages to look back over their working lives. The initial assumption was that, as people progress from one phase of life to the next, their work life balance issues might change; although it soon became apparent that this was an incorrect assumption in that individuals do not move across phases according to age groups, and many individuals move between phases in a non-linear way. Gradually the weight of research information led to the realisation that work life balance issues for women as parents, and for young families were more thoroughly researched than the issues facing older workers and those without children. Also, much of the research literature had considered work life balance within various professions in the private sector; such as accountants (Lightbody, 2008) and lawyers (Webley and Duff, 2007) etc., and it seemed that the public sector could make a useful focus; however it quickly became apparent that it would be impossible to question a meaningful sample of participants from all public sector organisations.

Having decided to concentrate the research on the public sector it then became apparent that it would be advantageous to focus on a single public sector organisation, as this would prevent the research becoming too wide and uncontrollable. Looking at the organisations that comprised the researcher's personal contacts through teaching on a public sector leadership development programme, the choices were Birmingham City Council, West Midlands Police, West Midlands Probation Service and West Midlands

Fire Service. A chance conversation about the research with a former student who was an officer from West Midlands Fire Service (WMFS) created an opportunity to discuss the research with the Chief Fire Officer, who agreed to his service being the focus. Not only were there a number of former students working at WMFS, but the researcher's partner was a senior officer and therefore there were many personal contacts and friends within WMFS. This choice added a number of benefits to the research. For example, many of the questionnaire respondents, and all of the interviewees were personal contacts, and there was a high level of trust in the confidentiality of responses. Being an "insider" meant that the questions asked of the respondents were more relevant to their work experience. Access to the history and background of WMFS was more readily available, and it became easier to cross check details such as policy initiatives, working hours etc.

West Midlands Fire Service (WMFS) proved to be a beneficial choice for research for several reasons, including location and personal contacts. The Chief Fire Officer agreed provide assistance through the Human Resources department to facilitate access to all WMFS staff aged 45 and over. This provided the opportunity to question men and women, uniformed and non-uniformed staff from senior managers to main-grade fire-fighters, administrative assistants and other support roles. While there is some suggestion that researchers frequently choose to research only those professional groups similar to their own (Chang et al 2010), this choice of an age cohort, i.e. all staff over the age of 45, across all roles within a single organisation, delivered the opportunity to consider a much broader group of individuals, undertaking a very wide range of roles. Despite the very wide range of roles, it was believed by the researcher that this was manageable for this research, as the likely respondents were still all employed by a

single organisation with a single set of policies and, quite probably, a single set of cultural norms.

## **4.2     Ontology**

Ontology is concerned with the nature of social reality (Grix 2002): in this case the focus is on the nature of the reality of work life balance as created and experienced by older workers, which may differ in material respects from that experienced by younger workers, and those with young families. Is the social reality of older workers that they have no work life balance challenges? Have they resolved all outstanding issues by the time they reach 50? Or are their challenges the same as or more than their younger colleagues? And as they approach and move through retirement, do they still have any work life balance issues? This research takes a constructivist approach to establishing the understandings and definitions used by older workers when they describe their work life balance, and these definitions are being continually re-created as the older workers react to events and circumstances in their lives. Much of the current research literature highlights the lack of shared and agreed understanding of exactly what is ‘work life balance’ and yet most people would seem to have their own personal definition of work life balance as it affects them, their work and the other aspects of their life. The very phrase itself, which is said by many to be problematic (Lewis & Campbell 2007) suggests a state whereby paid work and some other activity called ‘life’ should be held in equilibrium, and that spending more time doing one thing at the expense of another is somehow a failure to achieve a recognisable balance (Ransome 2007, Taylor 2006 p6). Despite the term being problematic, it is becoming a more widely used descriptor, particularly among academics and that was why it is used in this research. However, the fact that there are so many possible definitions means that it becomes very important to

find out what people mean when they talk about work life balance and to identify their view of their social reality in order to answer the second question as to whether any policies or initiatives introduced by an employer, or by the government, will have an appreciable impact upon their reality. Given that the individual participants have the ability to exercise some control, to a greater or lesser extent, over their own work life balance, the research will take a more constructionist rather than an objectivist perspective (Bryman 2012) when considering the most appropriate epistemological paradigm to adopt. This means that participants will be deemed to be able to develop their own meanings and definitions of work life balance and that their work life balance is to a greater or lesser extent under their control.

The ontological position of the researcher is as important to acknowledge as those of the research sample (Bryman 2004 p17), and it is the researcher's personal belief that good work-life balance, however defined, is beneficial for individuals and also for employers; that for individuals it reduces the risk of stress, poor health, careless accidents, and unhappiness at work; and for employers it offers a wide range of business benefits including improved productivity and skill retention (CIPD 2009). While it is often the case that the researcher may influence the research in some way (Bryman 2012), this research benefitted from the inside knowledge and personal connections of the researcher, who freely acknowledges the personal belief that both employer and employee have a role to play in improving work life balance; and that older workers may have issues that are specific to their age cohort in addition to those shared by the wider population.

### **4.3 Epistemology**

Epistemology is concerned with ‘how what is assumed to exist can be known’ (Blaikie, 2000, p. 8) or the ‘criteria by which we can know what does and does not constitute warranted, or scientific, knowledge (Johnson & Duberley 2000). The decision as to how to investigate the social reality of work life balance will depend upon which paradigm is adopted to guide the research methodology (Hill & McGowan 1999). Hill & McGowan (1999) refer to Kuhn (1962) who asserted that there were a number of different paradigms which were mutually exclusive and which would affect the researcher’s view of which type of methodology to pursue. Looking at the main research paradigms of positivism and interpretivism, offers the researcher a choice of approaches, each of which would have a tangibly different effect upon the nature of the research, and depends largely on whether the researcher has a theory to be tested by observation or data collection, or carries out the data collection from which to form a theory. Positivism uses mainly objective, scientific and therefore quantitative methods of data collection which could be more appropriate for hard scientific research and even some areas of testing social reality, but less so where the interest is in the personal experiences and perceptions of individual participants (Bryman 2004 p12). Given that the research here is concerned with interpretation of what the individual participants mean when they refer to their experiences of work life balance with reference to various points in their life course, the interpretivist or phenomenological model would seem the most appropriate to adopt, and perhaps offer an enhanced definition or description that more closely resonates with people’s working lives. This approach provides an opportunity to build the knowledge base rather than to prove or disprove a particular theory. Having said that, this research does start from a position that work life balance is a state worth working towards, although it has yet to be shown in analysis of the



research questionnaire whether older workers in the Fire & Rescue Service can attain it. A further challenge is that work life balance, being a very subjective idea, is very hard to measure; some respondents were able to gauge their work life balance on a score of 1 to 10, 1 being excellent and 10 being very bad, but this score changed according to the pressures of work, home and family at the time.

Taking a phenomenological approach offers an opportunity to find out what people think about the boundaries between their work and the other activities in their life, and enable more in depth personal questions to be asked. One challenge has been to distinguish between “work life balance” where the blending of paid work and other activity has an enriching effect for the individual (Clarke, Koch & Hill 2004), and “work life conflict” where the effects of combining paid work with other activity are seen in a negative light. Some authors suggest that activities in one aspect of life might improve the quality of life in some of the other aspects, and compare that to situations where work conflicts with family life, or where family life interferes with work (Greenhaus and Powell 2006). A further difficulty is that of describing work life balance only in terms of work-family conflict, as this could exclude those who have work life balance issues but do not have a family. However in this research the emphasis has from the start been clearly upon work-life where the time not spent in paid work could be described as encompassing all other domains of an individual’s life, such as social time, leisure activities, part time study as well as family and friends (Chang et al 2010).

#### **4.4 Methodology**

With regard to the research design, the use of a variety of research techniques, with questionnaires and interviews, and including some longitudinal aspects, offers an

opportunity both to enhance research skills and to ensure that the conclusions drawn from the data will follow logically from the analysis of the results, and that the methods are appropriate to the various aspects of the research. Seeking the personal views of participants as to their own situations and how they might define their own work life balance, and also looking at the impact that the organisational and legislative policies have on their perception of their work life balance, leads to the choice of qualitative data collection for this research. Using a phenomenological approach within the life course perspective would seem to be most appropriate for studying people's experiences of work life balance and exploring the ways that they describe those experiences. This means that the results of the research may not be exactly what is presupposed at the beginning, but will definitely rest upon the views and perspectives of the individual participants.

Qualitative interviewing of a selection of participants following their completion of a questionnaire will require analysis of the language they use, but should provide greater understanding of the meaning of work life balance to them as individuals, and thus to whether any organisational initiatives adopted or proposed will be of value to them.

Interviews with some recently retired fire officers can provide a way of looking back over a whole career span, thus offering a longitudinal approach. The validity of the results can be triangulated with the results from a whole-organisation attitudinal survey, an additional small number of questionnaire results from a national female group of respondents, and the results from a Department of Communities and Local Government survey carried out in 2007-8 (DCLG 2008).

Exploring the topic within the life-course, by addressing each of the key elements of the life course perspective, will provide an opportunity to consider the older workers in the

Fire & Rescue Service in a different light. The key elements of life-course analysis are that

- (a) there is continuity as well as change;
- (b) the age of a person may be measured as a biological, psychological, social or spiritual age;
- (c) people interpret the wider world through the lens of their family life;
- (d) there is often a link between experiences as a child and those in later life;
- (e) people can make choices and construct their own life journey by reacting to the opportunities and constraints that face them (Hutchison 2010).

With regard to continuity and change, working for the Fire & Rescue Service is seen by many employees as a career or vocation, in that most employees remain with the same employer or at least within the FRS nationally for their whole career, although many of them will undertake a variety of different roles during their career. It is the intention to explore whether older workers are treated differently in the FRS by their younger colleagues, and whether their family circumstances or previous life situations have affected their perception of their current circumstances. It also seems to be appropriate to consider whether decisions made as a young person, for example whether to join the Fire Service, have had repercussions for their work life balance later in their lives.

#### **4.4.1 The use of Metaphor**

While potential participants in the research sample all expressed knowledge and understanding of work life balance as a concept, it quickly became clear that each person not only meant something different by the phrase work life balance, but also used very different metaphors when describing their own work life balance. Some respondents also used a variety of metaphors when describing their thoughts and

planning regarding retirement, and so it seemed appropriate to reflect upon the use of those metaphors when analysing their responses. For example, participants who had spent time planning for their retirement and felt confident in their post-FRS lives may use metaphors connected with freedom, liberation, new beginnings, whereas those who feared an uncertain future or had delayed their financial planning and were now unsure if they could pay off their mortgage or repay debts might refer to notions of loss or threat (Sargent et al 2011).

Metaphors allow people to express their thoughts and beliefs in a way that has meaning for them, and in a way that enables them to build upon earlier thoughts to create a consistent picture for themselves. They will use a phrase that has two kinds of meaning: the literal meaning of the words and the idiomatic meaning to the speaker, and both meanings are intended, and often both meanings are understood by the listener (Glucksberg & Keysar 1993). However the meaning of any metaphor is personally and culturally referenced (Lakoff & Johnson, 1980 p.110) so, for example, a description of work life balance as a “juggling act” offers a literal picture of a juggler throwing various items into the air and catching them again (easy for the expert and extremely difficult for a beginner), while at the same time conveying an idiomatic meaning of trying to retain control of several different demands on the individual. Some of the respondents have spoken of “spinning too many plates”, which again refers literally to a stage performer able to spin a large number of plates upon sticks, but more idiomatically means that the individual is concerned that some of their responsibilities may not be met, i.e. the plates may fall. When discussing work life balance, which is itself a metaphor involving notions of equilibrium, individuals and academics have their own metaphors which may add clarity or may confuse a reader seeking to gain an overall idea of what work life balance is for them. When starting to research work life balance

as an academic subject, interested by-standers would often offer to describe their own work life balance, and it quickly became apparent that there were many different meanings of the phrase. This has been compounded by the wish of academics, practitioners and politicians to create a variety of different phrases to add a nuance or additional meaning to an apparently widely understood concept: this has been discussed in greater detail in the Literature Review, Chapter 2, under the section on Workable Definitions.

So what do the research participants mean when they talk of their own work life balance? Are they describing the feelings of stress and anxiety due to being given more work than they believe themselves capable of achieving? Or are they describing a job which has extremes of inactivity coupled with extremes of dangerous rescue work? Is the paid work they undertake interfering with the other activity they want to carry out in their spare time, or are the demands of family life (young children, elderly parents, financial problems) interfering with their ability to complete their day's work effectively? These differences in meaning, and the different metaphors employed to describe them, necessitate the use of research methods that allow the individuals to express themselves and their ideas without the researcher imposing preconceived constraints on their meaning.

The inherent danger of trying to interpret someone else's metaphor is that the listener may apply a totally different interpretation to the metaphor used by the speaker, and thereby start working with an idea that is not what the speaker is trying to express. From an ontological perspective this could be very problematic as, at some point, the researcher will need to make a value judgement about the social realities that the speakers convey. But there are ways around this problem. In the therapeutic field, for

example, the listener is encouraged to work only with the metaphors provided by the client, and not to impose their own meaning on the words used (Grove & Panzer 1989, Lawley & Tompkins 2000, Sullivan & Rees 2008). This method of using only the speaker's phrases is known as Clean Language (Grove & Panzer 1991) and is now becoming widely used in business and education as well as psychology. Working only with the speaker's own metaphors is a very fast and effective way of arriving at their true perception of a situation: and for therapists and educators it is also effective in helping the speaker to shift their perception as they explore their own metaphor (Dunbar 2005), which could be useful in interviews. While it is not proposed that an entire interview would be conducted only using clean language protocols as this would make an interview stilted and may not get to the relevant information, it is certainly planned to use the interviewee's words and phrases wherever possible to gain a clear impression of their own meaning of work life balance, and this may help in the formation of a clearer view.

#### **4.5 Research Methods**

The research methods themselves can be described as the 'techniques or procedures used to collate and analyse data' (Blaikie, 2000, p. 8) and a combination of qualitative research tools was adopted; specifically a qualitative questionnaire to provide a snapshot at a specific time, supplemented by email questions over a few months to test whether people changed their view according to their changes in circumstances, and triangulated with face to face interviews with a small number of retired people to look back at their working lives. Having decided to use a locally based public sector organisation as the focus of the research, the Chief Fire Officer of West Midlands Fire Service (WMFS) was approached to give permission to survey all employees over the

age of 45 and he arranged for their Human Resources (HR) department to provide support. The fact that the HR department were assisting raised an ethical issue in that access to the research sample was gained through a third party, and it was not clear whether everyone would be willing to use HR as a conduit. However, only one person requested a personal postal address saying that she would not even hand her sealed questionnaire in to HR, but despite supplying an address she did not send it back. All others seemed happy to either email direct, or send anonymously via the HR department, and therefore issues of dealing with a gatekeeper were minimal. The answers from each respondent were transcribed onto an Excel spreadsheet, which could then be manipulated to identify emerging themes.

#### **4.5.1 Selection of participants**

The involvement of the HR department in the recruitment of volunteers for the questionnaire was at the suggestion of the Chief Fire Officer. This began with an initial discussion with the HR Manager for Employee Relations to explain the extent of the research and to explore ways of utilising the services of HR to gain the maximum possible response to the questionnaire. It was agreed that they would first send out an email to the department managers setting out the reasons for the research, and seeking their support in encouraging responses from all their older team members. This would then be followed by the email and questionnaire (which can be found at Appendix items 1 and 2), which was sent to the 400 WMFS employees who were aged 45 or over as at May 2010. The involvement of a third party in the distribution and collection of the questionnaires could have affected the response rate, in that some employees might have distrusted the impartiality of HR and therefore distrusted the basis for the research. That could also be said regarding the fact that the researcher was known to a large number of WMFS employees through training and also through social contacts.

However, a response rate of slightly in excess of 25% seemed to justify the risk of using HR, and respondents had a choice of emailing the questionnaire direct to the researcher or printing out the questionnaire, completing it and giving it to HR in a sealed envelope ready for collection. Where the responses to the questionnaire are quoted in the later chapters they are identified by a number indicating the order in which they were received and logged, together with M or F for gender and then U for uniformed and S for support staff. Those respondents who completed their questionnaires while still employed and have since retired are still coded as U or S.

The second stage of the research was to invite respondents to answer a few emailed questions over a period of three to four months to find out whether their work life balance was changing over time, or when their circumstances changed, for example if they had just returned from leave, or had worked shifts over the weekend and felt tired. This group self-selected by responding on their questionnaires that they were happy to be contacted for further questions, and some 25 individuals volunteered to answer the emails. Three questions were emailed each month for four months, and these can be found at Appendix item 3. The number of responses dropped off steadily, as some individuals retired and others simply chose not to respond, but there were 14 remaining at the end of the four month period and analysis of this small number was therefore relatively simple. Where the responses to the emails are quoted in the later chapters they are identified as having been made in response to the email questions.

Finally a group of 10 individuals who had retired during the previous two years were approached to be interviewed regarding their work life balance, looking back over their career in the Fire Service. These individuals were all personal acquaintances of the researcher, who made the approaches initially at social events such as retirement functions, and then followed up by email. The email, which can be found at Appendix



item 4, set out the reasons for the research and for the interview, listed the general questions that would be asked, and included a participant consent form. The interviews were conducted at times and places to suit the interviewees, so some occurred in people's homes, some in neutral meeting places, and a couple were conducted at the offices of WMFS, for those individuals who had retired and then returned to work for WMFS in a different capacity. The interviews were digitally recorded and then transcribed by a professional transcription service. This enabled analysis through reading the transcripts and also listening to the tonality of the responses. With a small number of transcripts analysis of common themes was straightforward. Where any responses are quoted in the later chapters they are stated to be by 'an interviewee', but not necessarily identified as male or female, or uniformed or support in order to preserve their anonymity and confidentiality.

Results from the WMFS staff attitude surveys conducted in 2009 and 2011 were also made available, and these provided a complete picture of the attitudes of the whole workforce, not just those over 45, so any major differences in older and younger workers' opinions could be noted. This enabled triangulation of the questionnaire results and confirmed the validity of the responses.

In an attempt to understand the policy context on work life balance in the public sector, all the representative bodies of the various groups of employees within the Fire & Rescue Service (FRS) were contacted to ascertain whether any of those organisations held an official position or had endorsed a policy on work life balance, and to try to gain a national view from industry representatives. Emails and follow-up letters were sent to the Chief Fire Officers Association, the Association of Principal Fire Officers, The Fire Officers' Association, Fire Brigades Union, the Retained Firefighters Union, UNISON

and the GMB, being the staff associations and trades unions that represent FRS employees at different levels, but the response was disappointing. The first round of emails produced a reply from Unison, which is the UK's biggest public sector union, representing over 1.3 million public sector workers: their response was that they did have a policy but didn't think that many of their members worked for the Fire & Rescue Service, so declined to provide any information. In fact, many non-uniformed FRS employees across England and Wales are members of Unison, so their response was a surprise as well as a disappointment. Second emails were sent to the representative bodies and the email to the Fire Officers Association produced a very helpful response in that they had no work life balance policy but believed this to be a problem in the FRS as many officers felt obligated to work longer hours to demonstrate commitment in order to gain promotion. The office staff at the Chief Fire Officers Association refused to pass the request on to any Chief Fire Officer, and treated the question as being directed only to the office, which employed 6 people and did not have a work life balance policy. No responses were forthcoming from the Fire Brigades Union, the Retained Firefighters Union, GMB, nor the Principal Fire Officers Association, despite sending second reminders. The most helpful response came from Networking Women in the Fire Service, which is an informal network to support and lobby for the women working in the FRS whether operational (uniformed) or not. One of their members agreed to be interviewed over the phone, and provided a useful starting point for consideration, as well as some illuminating comments. Networking Women in the Fire Service also issued an invitation to one of their training weekend workshops to enable some further discussions with their members about their work life balance, and provided 20 further questionnaire responses which provided a national, female, perspective. Any references to comments from members of Networking Women in the Fire Service have

the letters NWFS as a final part of the identification, although the general analysis in this chapter concentrates on the responses from WMFS. There were some other groups such as those representing black and minority ethnic workers but their contact details were not available at the time of the research.

Keen to gain further comments from the representative organisations, an opportunity arose to attend the 2010 National Fire & Rescue Conference where it was possible to speak directly to several key individuals, and discuss aspects of the research with employees of other Fire & Rescue Services around the country. While there was insufficient response to provide a control group, the gist of the responses was that work life balance was indeed a problem for FRS workers as they gained more responsibilities within the service. The general tenor of their personal work life balance situations was that they believed that main grade fire-fighters had control over the hours they worked, whereas the middle and senior managers felt they had little control over the amount of hours they worked, and therefore that work life balance would only be an issue for managers. This view certainly held sway among the respondents from WMFS.

It would be fair to say that there have often been tensions between the various Fire & Rescue Services as employers and the Fire Brigades Union, which is explained in further detail in the following chapter. There have been many occasions when both sides have tried to get the best deal for their members, and it was therefore somewhat surprising that there was little interest from the FBU on the matter of work life balance.

#### **4.6 Sources of data**

The primary data was from the 113 responses to the research questionnaires to staff over 45 and interviews with a number of serving and retired employees from WMFS. 20 questionnaires were also completed and returned by members of the Networking

Women in the Fire Service. Following receipt of the questionnaires and analysis of the results, four sets of questions were sent out by email to the 20 volunteers who had offered to provide additional information. While this number naturally dwindled over the four month period, there were still 14 full sets of answers. Two of the 20 had just retired, and one of those agreed to be interviewed. A small number of recently retired fire officers also agreed to be interviewed and to look back over their careers to identify where work life balance had become an issue for them. They were chosen at random, relying upon personal contacts either through friendships or as former students, but all were happy to be interviewed. The email sent to those who agreed to be interviewed, setting out the general questions and the participant consent form are included in the Appendix at item 4.

The West Midlands Fire Service had recently conducted an Employee survey which asked some questions relating to well-being at work, and the data were made available for comparison with the questionnaires and interviews. The data from this were compared to a subsequent survey carried out two years later, and the particularly interesting questions were around how older workers perceived their treatment by their younger supervisors and managers: there was evidence in several departments of an “us and them” culture which was having a damaging effect upon productivity and efficiency.

Secondary data also came from the HR department of WMFS in terms of numbers of employees, age, gender, ranks and roles of the individuals aged 45 plus. Additional information was obtained through the Department for Communities and Local Government statistics (DCLG 2010), and from the DCLG report into working in the fire

service (DCLG 2008) together with articles and research reports connected either to the Fire & Rescue Service or to work life balance and well-being.

#### 4.7 Characteristics of the sample group

Firefighters	9 Male	
Crew Commanders / Managers <sup>1</sup>	10 Male	1 Female
Watch Commanders / Managers	30 Male	2 Female
Station Commanders / Managers	10 Male	
Group Commanders / Managers	5 Male	
Area Commander / Manager	1 Male	
Fire Safety Officers / Supervisors	3 Male	2 Female
Fire Control	1 Female	
Administration / Clerical / ICT	5 Male	11 Female
Middle Managers	7 Male	6 Female
Specialist Technical Roles	4 Male	4 Female
Other Support Roles	1 Female	
Role/ Gender not declared	1	

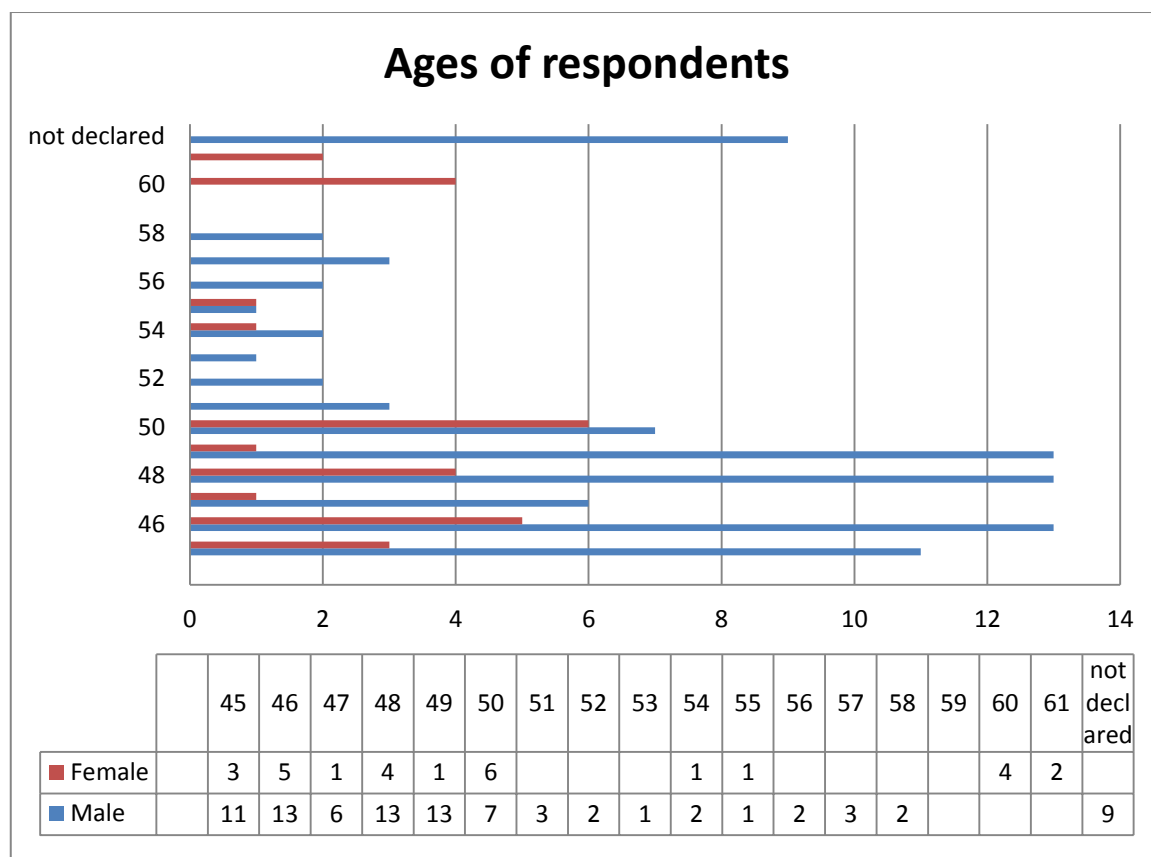
Age: the majority of respondents were aged between 45 and 50, which validated the decision to sample all those aged 45 and older, despite ‘older workers’ being usually defined as 50+. Nine respondents didn’t declare their ages but of those who didn’t say, seven said they intended to retire between the ages of 50-55 so must have been younger. This compares with the older cohort age breakdown within the WMFS supplied by the Human Resources staff as follows: Support staff aged 45+ as at May 2009 were 156 female and 121 male; non-operational staff were 5 female and 128 male; operational (uniformed) staff were all male, n= 303; and Fire Control staff were 22 female and 1

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<sup>1</sup> Some managers referred to themselves as managers and others as commanders – however the roles are largely the same, simply the title given indicates some confusion as the terminology of commanders becomes more widely used.

male. The NWFS respondents were generally younger, as this was a more general look at work life balance issues for women nationally.

The age breakdown of respondents is as follows:



Gender: There were 27 female respondents, of whom 6 were uniformed. 66 out of the 86 male respondents were uniformed, and the other 20 held a variety of job roles – see the table in the Appendix. The national figure for women firefighters has risen from 1.7% in 2002 to 4.3% in 2012 (CLG 2012) of the uniformed workforce, but many of those women firefighters are likely to be under 45, which could explain why there are so few in this sample. It was encouraging, however, to have so many non-uniformed female respondents completing the questionnaires, and that may indicate that work life balance is an important issue for them. Women did not join the Fire & Rescue Service

until the 1980s and many of those who did, left within 20 years, so it is not surprising that there are fewer female officers in this research sample of personnel aged 45 and over.

With regard to the ethnicity of the respondents, 98 described themselves as White British, with 1 Welsh and 1 Scottish, 2 Irish, 1 White Other, 1 African Heritage, 1 Sikh, and 1 mixed race Afro-Caribbean / White British; the remainder did not say. Again this closely reflects the national statistics and is discussed in the literature review in Chapter 2 earlier.

Job roles: A few years ago, the Fire and Rescue Service moved from 13 ranks to 7 roles in an attempt to rationalise and flatten the organisation; for uniformed staff there are now the 7 defined roles, each role having a “role map” that describes the work load, and indicates the skills and knowledge expected. However this has not worked as intended as these compressed roles have subsequently been sub-divided to indicate greater and lesser responsibilities so, for example, a person may describe themselves as Watch Manager A or Watch Manager B, depending on what they do. Organisational changes within the West Midlands Fire Service resulted in Managers being called ‘Commanders’, but it can be seen from the responses that there is still considerable confusion among staff members as to how to describe their roles, with some calling themselves managers and others commanders. There are only a few FRS within England that designate their managers as ‘Commanders’, and the apparent military denominators may reflect the personal preferences of the current Chief Fire Officer. Non-uniformed staff have job descriptions which tend to mirror the role maps, but there is much greater variation between roles. As this survey was seeking views from all

employees aged 45 and over, most of the job roles within the organisation have been represented.

Normal patterns of work are described by the respondents in a variety of ways which reflect the five different shift patterns that are used by WMFS. For example, some fire fighters refer to a '9 day fortnight' which indicates that they work 42 hours on day shifts only, taking a Monday or a Friday off each fortnight. Some of the others speak of 2,2,4 to describe their 42 hour work system of two longer days on, then working two nights, followed by four days off. Firefighters are normally contracted to work 42 hours per week. Flexi-duty officers work 78 hours per week (although they are at home on call for much of that time, and their working hours should average out at 48 hours per week over a 17 week period). The more senior officers such as Borough Commanders and Area Commanders are expected to be on call for much longer periods. Flexi-duty officers receive a 20% pay uplift to compensate them for the additional time spend on call and working unsociable hours. Most administrative non-uniformed staff work to a 36 hour week, although many employees are part time or job share. Those staff who work flexi-time generally report higher levels of satisfaction with their work life balance, even when working to the same 36 hour week. Respondents tended to specify their contractual hours in this section, whereas their answers to later questions, such as - 'How many hours per week do you regularly work?' and - 'Do you ever work longer than your contractual obligations?' indicated that many of them regularly work more than their contracted hours. Non-operational female staff tend to work within a 36 hour week, some part time and some on flexible working patterns. This differential between male and female workers is very much in line with working hours across the EU (Eurofound 2013) where recent studies suggest that the gender gap in weekly working time remains significant, with men in the EU27 working on average 40.2 hours and



women 35.4 hours per week. But, considering this from a life course perspective, women's working time is strongly influenced by their life stage, and in all life stages, employed women work fewer paid hours than employed men (Eurofound 2013).

Length of service with WMFS: There are many uniformed respondents who joined the fire service when young and clearly intend to continue there until they retire. Many of the non-uniformed staff took their job as the hours or work or location suited their needs at the time, although there are still many administrative staff who have spent, or hope to spend, all or most of their working life in the same organisation.

#### **4.8 Ethical issues**

The planning, conduct, and reporting of any legitimate academic research all has to be ethical and fair to the participants. In addition, the collection, use, and interpretation of research data and the way in which the findings are reported are also subject to ethical constraints. It will be necessary to acknowledge friendships and relationships that could affect the research, and to set out some way of responding to any misunderstandings or disputes. It is also necessary to acknowledge personal prejudices and bias, particularly as several uniformed and non-uniformed staff had been previously known as students, and opinions about them or about the organisation could have been formed at that time.

The choice of West Midlands Fire Service (WMFS) for the organisation has not been made without considerable attention to the ethical aspects:

- The researcher's partner is employed in a senior role with many years' service and, having attended many social events with WMFS staff and their partners, this enabled much greater access to willing volunteers for response and

interview, but had implications for confidentiality which needed to be explicitly stated in the questionnaire and interviews;

- The researcher taught a large number of WMFS staff on a variety of management development programmes at academic levels 3, 4 and 5 on the National Qualifications Framework, while not wanting to abuse any confidences that had been gained from the classroom, this again provided greater access and, possibly, greater honesty in some responses. It was certainly possible to remember comments that had been made previously and consider those in the light of some of the responses.
- Working, at the time of the distribution of the questionnaire, with the training and development departments of many of the English Fire & Rescue Services, including WMFS, increased knowledge and understanding of the wider FRS issues, as well as of other public sector organisations.

Because of the close personal connection, it was therefore necessary to include a very detailed promise of confidentiality in the questionnaire, the participants consent form and in the verbal “contract” with any interviewees. A copy of the consent form is attached to the email to retired personnel and can be found at item 4 of the Appendix. On the other hand, even though there are some ethical considerations to address, the position as an “insider” also has its benefits, bringing understanding of the management structures and the culture of the organisation, as well as a greater awareness of its background and history (Bryman 2012). For example, one WMFS employee who did not complete a questionnaire nevertheless provided historical background information regarding the formation of West Midlands Fire Service. It may also be the case that many respondents were happy to respond because they knew and trusted the researcher.

This was particularly useful when conducting interviews with retired WMFS personnel, all of whom said they had complete trust regarding confidentiality.

#### **4.9 The Research Process**

The research process itself began with a very general literature review of the background history of work life balance as a concept, and considerations of how work life balance affected different age groups and categories. It quickly became apparent that the majority of literature revolved around the issues facing women and young families, and this led to a decision to concentrate the research on older workers. There was relatively little literature on the Fire & Rescue Service, although the Library of the Fire Service College in Morton in Marsh was particularly helpful in identifying and supplying recent research papers and articles, together with copies of students' projects for their higher level courses. Looking for articles concerning work life balance for older workers in the public sector yielded a vast number of articles, books and papers, with many of those emanating from Australia, USA, South Africa and many comparative works from the EU, and these added depth and breadth to the literature search. Searches were conducted using combinations of key words and phrases such as "work life balance", "older workers", "public sector", "fire & rescue service", "approaching retirement", "un-retirement", "shift working", "stress", "well-being", "decision making", "working hours", and these all produced a variety of useful articles and books for further study. Following up on other writers' bibliographies also proved fruitful.

A major challenge was in the use of the actual term work life balance, as opposed to work family balance, work family integration, work interfering with life, life interfering with work, work family conflict and several others. Once the decision to concentrate

upon older workers had been made it became easier to identify those phrases that involved work as opposed to family, although it is fully accepted that older workers have children too. While the phrase work life balance does not do justice to the huge variations in individuals' lives, it is used here because it is something that most people feel they understand. However there is a variety of meanings applied to this phrase, and so there is also an issue of what that phrase means to the individual rather than the researcher.

A review of the history and development of work life balance policies, firstly in the EU and then in the UK, became the next logical step for the literature review. For a law graduate with a specialism in employment matters, this was familiar and comfortable territory, and there was much literature in the employment law field to provide a sound understanding of the background to the European and subsequent UK policy situation, which were detailed in the literature review in Chapter 2.

Working within a life-course perspective and looking at the different age categories in greater detail confirmed the findings from the initial literature searches that there was much more research on women, women's ability to choose, issues around family friendly policies and general mid-life work life balance. Information about older workers came from social scientists with an interest in ageing and this revealed some interesting studies suggesting that the actions taken by an individual pre-retirement can have a considerable effect on their well-being (they rarely use the phrase work life balance) after retirement. Indeed many older people choose to return to employment after they retire, and this raised the question of whether retirement was a true 'transition' from one phase in the life course to the next, or was it a longer term activity that could take several years, and many changes in employment status.

Part of the reason for sending a questionnaire out to all employees aged 45 and over was to get a representative sample of volunteers for interview and further questioning. Initial questions were therefore about the respondent's age, gender, ethnicity, current role within WMFS, and length of service. Wishing to encourage the participants to provide comments in their own words, meant including an opportunity for comment after most questions as well as at the end of the questionnaire, even though that would create more work in coding and analysing their responses. So the first specific section of the questionnaire was "About you and your work life balance", with the first question being 'What does work life balance mean to you?' The responses to this question have been very interesting, with some participants mentioning their wish to devote an appropriate time to their families, and others that they have sufficient energy to carry out their work duties in addition to their own lives. One respondent was critical about this question for using a "meaningless term" and suggested that the usual vocabulary used by older people had not been well understood. Another suggested it was simply an "in-phrase" to manipulate the workforce. This response served as a reminder that not all respondents complete a questionnaire for altruistic reasons, and that some people might use an opportunity of a survey to criticise their employer rather than provide factual information.

Within a period of four weeks, 113 responses had been received out of a sample population of 405, and these included 20 offers of interviews and/or further information. The responses came from a good cross-section of the older work-force, with both uniformed and non-uniformed staff responding, and provided a 25% return. However, this suggests that the other 75% of older workers at WMFS chose not to respond, and so the question arose as to how to deal with what could be classified as missing data. This was compounded by the fact that the questionnaire had explicitly stated that respondents

did not need to answer every question if they did not want to – and some of them had so chosen. Even crucial information about age, gender and length of service were sometimes omitted, which could cause a problem in analysis in that any extrapolation could be challenged. Some of these issues might be addressed in subsequent interviews, but others may have to be fully explained in the findings and analysis. However, the fact that several of the responses correspond closely with those provided to the Department of Communities & Local Government (DCLG 2008) and with the Employee Attitude Surveys, as well as the responses from Networking Women in the Fire Service, would suggest that these responses are generally reliable in providing a picture of the perceptions of work life balance of older workers in the FRS in June 2010.

Being aware that some firefighters and some administrative staff regularly work longer than their contractual hours provided the opportunity to ask whether they did so, whether they then took time off in lieu, and also if they took all of their available holidays. Some respondents stated that they work longer because they feel obliged to finish a specific piece of work, others because they feel this will demonstrate commitment to the organisation and thus increase their chances of promotion, and others because it had not dawned on them that they should not work excessive hours. This final group were often managed by a manager who himself (or very occasionally herself) worked long hours, and came to work on their rota days (when they should have taken the time off), and suggests that there could be an overriding organisational culture of working longer hours which may negate any policies or initiatives to improve work life balance. However some respondents were keen to point out that they did not want to keep strict boundaries between work and the rest of their lives, and were quite happy to put in extra hours where they perceived it necessary, one of them describing his situation as a “work-life blend” (108-M-U).

The return of so many questionnaires (113) together with 20 offers of additional information provided a representative sample for further questions. So a number of brief questions were sent out by email to those respondents on a monthly basis, to ascertain whether their views on work life balance changed over time or as a result of changes in circumstances. These questions were general in nature, but did ask about their recent work pattern; to see if that had an impact. The intention was to send out the email questions every four weeks over a three to four month period and, although this was a very short period in terms of a longitudinal study, it did provide something more meaningful than a simple snapshot of the organisation, indicating that for many respondents their perception of their work life balance did correspond to their current situation. Copies of the emailed questions can be found at item3 in the Appendix.

The responses to the questionnaire were collated using an Excel spreadsheet, which provided space for all of the additional comments as well as the Yes/No/Sometimes answers. These were entered onto the spreadsheet as they were received, and patterns of thought and of behaviour gradually started to emerge as the spreadsheet filled up. This enabled consideration of the metaphors used to describe both work life balance and also aspects of retirement. Once all 113 responses had been entered it was then possible to group the respondents in terms of age or gender or job role to see what similarities and differences appeared. This provided ideas for the email questions sent out a few months later and also for the interviews with the retired personnel. The email questions were sent to 20 individuals employed by West Midlands Fire Service between September 2010 and January 2011, and the responses were transferred to a Word table and then to NVivo. While attending the Economic & Social Research (ESCR) Research Methods Festival in 2010, a presentation on NVivo software for analysing qualitative data had appeared to be an excellent way to deal with the data that was already arriving.

Training and a student copy of the software was provided by the University of Leicester however, although the training was excellent, it soon became apparent that the responses to some of the research questions could not easily be transposed into NVivo and although it was useful in analysing the responses to the email questions (which were all in prose or single digit numbers) it would have been too time consuming to attempt to use it for analysis of the whole questionnaire. Had information and understanding about NVivo or other analytical software been gained prior to designing the research questionnaire then the questions could have been crafted so that the answers would more easily fit into the system; a learning point for future research.

The final aspect of the research was to interview a small number of fire officers who had retired during the previous 24 months, asking them to look back over the past few years of their fire service careers and consider when and where their work life balance issues occurred and in what circumstances. There is research (Calvo et al, 2009) that suggests that a person's well-being post-retirement can be impacted by their work situation and planning pre-retirement. The importance of this aspect is reflected in the following comment from one of the respondents:-

*“I have retired from the operational side and am employed as a civilian ..... The pressure to perform for promotion has gone. The strain of operational duty and shift work has also gone. I am happier in my work due to the control I have over my job and workload. Flexible working hours is greatest benefit in my work/life balance. I am financially secure and socially better off, enjoying my day to day work.” (33-M-S)*

The idea of “un-retiring” (Maestas 2010), particularly for those who would normally retire in their 50s, is quite common among the still serving respondents. The knowledge



and experience of long serving fire officers was therefore a valuable resource not to be missed, as well as providing another opportunity to consider a longitudinal approach. These semi-structured interviews were recorded on a digital recorder and then transcribed by a transcription service, to enable direct quotations to be used where necessary, and added a further dimension to the research.

In conclusion, this wide variety of data enabled consideration and comparisons of the responses in a number of ways: male / female, uniformed / non-uniformed, fire-fighter / fire officer, working / retired, yet was still a manageable sample to work with. On reflection, the choice of older workers in the Fire & Rescue Service enabled an in-depth review of workers within one part of the public sector, and an exploration of whether their approach to retirement was helping or hindering their work life balance. A qualitative approach allowed the individual participants to express their own feelings and perceptions of their work life balance issues in their own words. Email questions sent over a period of months, while not a long term longitudinal study, did enable consideration of how perceptions changed depending upon changes in work and home life. Finally, the opportunity to interview some retired personnel created a richer picture of whole-life careers from start to finish, when those interviewed could look back over their working life and identify when some of their work life balance issues had arisen, again highlighting how work life balance covers home and social life as well as paid work.

The following chapter will introduce the reader to the Fire & Rescue Service, explaining in more detail some of the issues around the different ranks/roles undertaken by staff, and exploring the impact of cuts in public sector funding and changes in the pension schemes on the older workforce. This is then followed by two chapters

analysing the results from the questionnaires, emails and interviews, and then considering the work life balance issues around the transition through retirement.

## **Chapter 5**

### **The Fire & Rescue Service**

Why is work life balance an important issue for the Fire & Rescue Service to address? It is because decisions on the fireground made by fairly junior managers such as crew commanders are likely to be safety critical and the best decisions are believed to be made when the manager is calm, alert and feeling confident in their ability to make a good decision (Klein 1998, Flin 2008). Those feelings of calmness and confidence are much less likely to be present when the manager is under stress (Mostert, 2011). Calm decision making is equally important for non-uniformed staff, whose roles essentially support the operational work, in addition to the general health, safety and well-being of the workforce. The importance of decision making in the Fire & Rescue Service is discussed below.

The chapter provides an introduction and background information on the English Fire & Rescue Service generally, including the continuing issues around the Working Time Directive and the impact of the Modernisation Agenda, which radically changed the working conditions of FRS employees. Future changes to working conditions and retirement dates are likely following changes in the Firefighters' Pension Scheme and the Local Government Pension Scheme and this is briefly considered, together with a discussion on the policies and procedures aimed to improve well-being and work life balance for staff. Looking at the West Midlands Fire Service in particular, the chapter outlines the different roles of uniformed Firefighters and Senior Officers as well as those of non-uniformed staff. The chapter concludes with an examination of some of the responses to the research questionnaire, emails and interviews on matters specific to working in the FRS. Remaining within the framework of the life course, this chapter

will also explore questions of the influence and impact of choice of career and perceptions of treatment due to life stage; for example, whether younger managers or supervisors have treated respondents differently due to their age or proximity to anticipated retirement.

## **5.1 Introduction and Background Information**

In the early 20th Century, Fire Brigades were small, local organisations run by town councils, without national or even regional consistency of service. By 1938 there were nearly 1500 local Fire Brigades, some just concentrating on fire-fighting and others linked with other rescue services such as the ambulance service. At that time there was no statutory responsibility for local authorities to provide fire protection within their boundaries, and no requirement to hold up to date or functional fire-fighting equipment. The Fire Brigades Act 1938 addressed many of those short-comings, but all fire-fighting was temporarily nationalised during World War II and this introduced greater coherence (Ewen 2003). The Fire Services Act 1947 returned fire fighting to a municipal rather than a military duty, but imposed a structure with much greater uniformity across 135 local fire brigades under the management of county and city councils, together with introducing national standards of performance.

Through a series of amalgamations and boundary changes in the years following World War II, there are currently 55 Fire & Rescue Services across the UK, 46 of which are based in England. This has recently reduced as 8 Fire & Rescue Services merged to create a single Fire & Rescue Service for Scotland in the April 2013. Emphasis has moved from fighting fires to fire-prevention, and the number of domestic property fires has fallen dramatically since the 1980s (DCLG 2008). This has been due to a combination of improved housing stock, the fitting of smoke detectors, increased public

awareness, and lifestyle changes such as a reduction in cigarette smoking, and fewer chip pans being used to fry chips at home. These changes have impacted the demand for fire-fighting and also have changed the working environment of those employed by the Fire & Rescue Service, in terms of hours worked, working conditions, and operating within financial constraints.

Prior to 1979 each fire station was staffed by three watches, which were called Red, White and Blue Watch, and most fire stations would have a station officer, a sub-officer, a leading fireman and eight firemen for each watch. At that time the working week was 56 hours and shifts were set on a three week basis. In 1971 the shift system had moved from a 56 hour working week for main grade firefighters to a 48 hour week on the same three week basis but an extra day shift off within the cycle. In 1979, mainly in response to the national strike in 1977, this was further reduced to a 42 hour working week whereby firefighters worked on a 2-2-4 basis, which consisted of working two 9-hour days, followed by two 15-hour nights and then taking four days off. This necessitated the introduction of a new colour watch (Green Watch) which increased the national Wholetime workforce by an additional 25%, phased in over a 6 year period. It is this group of individuals who joined in 1979 – 1985 who are now retiring and who, due to a number of factors discussed later in this chapter, are not being replaced.

The Fire & Rescue Service has been chosen as a focus for this research because it holds within it several very distinct groups of workers, on different contracts and facing different retirement ages; uniformed and non-uniformed; some operational and some in support functions. Fire & Rescue Service employees are public sector, local government employees and it is hoped that the findings and recommendations arising from this research will benefit FRS organisations in particular but also the wider public

sector in general. For many FRS employees, the fact that they are public servants and providing a public service is very important to them in terms of their individual identity and self-esteem, and the notion of altruism is high on their reasons for joining and remaining with the organisation. There are some differences in the work life balance issues for public and private sector workers and this is considered in more detail later in this chapter.

Uniformed Fire & Rescue Service employees now work on a variety of different patterns of working, for example there can be several different shift systems in any one Fire & Rescue Service. Some work a “nine-day fortnight” which means that they will work for nine days in 10 working days and take one rota day per fortnight; others may have a more complex shift system of working two days, two nights and taking four days off, which can be disruptive to normal sleep patterns, and others may always work late shifts, for example 11.00am – 11.pm. Senior officers are often employed on a flexible duty system where they will be on call over some nights and weekends, taking ‘rota days’ off in lieu of weekends – there is usually an increased payment for working unsocial hours. Those who are employed full time as fire-fighters are employed on what are called ‘Whole Time’ contracts, usually working for 42 hours per week, whereas ‘Retained’ fire-fighters only attend the fire station when they have received an emergency callout, or for pre-arranged training. Retained fire-fighters will usually have other occupations but have the agreement of their main employer to attend emergencies. Non-uniformed staff, the majority of whom are female, are more likely to work all or part of a 36 hour week, but may do so on a Monday to Friday 9-5 basis or on flexible or part time working arrangements.

The Fire & Rescue Services Act 2004 sought to address national criticism (Bain 2002) of the somewhat militaristic structure of eleven ranks, and replaced it with seven roles.

The move from ranks to roles was intended to encourage softer management skills, and to identify what people did, rather than their position in the hierarchy. Currently the main operational roles are Fire-Fighter, Crew Commander (managing the crew on a single fire engine or appliance), Watch Commander (managing the several crews on a single watch), and Station Commander (managing all the activities on a fire station). Senior officers manage a variety of specific activities across the Fire & Rescue Service such as a group of fire stations, training & development, fire safety, community safety, and emergency response. Senior Officers comprise Group Commanders, Area Commanders and the most senior are Brigade Managers (e.g. Chief Fire Officers, Deputy Chief Fire Officers and Assistant Chief Fire Officers). Station, Group and Area Commander roles are further sub-divided into A and B roles, to reflect additional responsibilities, for example Station Commanders managing several fire stations. Each role has a number of specific duties and responsibilities, called a Role Map, against which the individual will be measured during their annual appraisal which is usually termed a Performance Development Review (PDR).

## **5.2 The Modernisation Agenda**

In November 1977 there had been a national strike by firefighters, seeking a 30% pay rise in the face of the then government's 10% pay rise ceiling for public sector workers. While they were on strike for nine weeks, the Army stood in at emergencies, using their Green Goddess fire engines: firefighters eventually accepted a 10% pay increase. Firefighters went on strike again in 2002/03 (Ewen 2003) and the long-running dispute, which included a series of one-day stoppages over a period of several months, ended with a 16% pay rise tied to a modernisation package (Bain, 2002). Following the Bain Report (2002) the Modernisation Agenda brought about a dramatic change of emphasis for the Fire & Rescue Service and changes in working practices and the structure of the

Fire & Rescue Service as a whole. To implement the changes in the Bain Report, the Fire and Rescue Services Act 2004 came in to force on 1 October 2004 and replaced the Fire Services Act 1947. It put the prevention of fires at the heart of legislation by, for example, creating a new duty to promote fire safety and by providing the flexibility for fire and rescue authorities to work with others in the community to carry out this duty. Prior to Bain, promotion to each rank in the Fire & Rescue Service was gained through training and examinations and, even before a firefighter could apply to take the examination, there was a length of service requirement. This structure valued command through experience and under-pinning knowledge over softer management skills. Following Bain, role maps were introduced for each role, and promotion to new roles was through Assessment Centres, where applicants needed to show that they had the necessary personal qualities and attributes (PQAs) rather than any prior experience or knowledge. This enabled direct entry to managerial roles from non-fire sectors and encouraged people with high level management skills to enter the Fire & Rescue Service at quite senior levels. At a national level, several senior female Brigade Managers entered through this route however, a number of respondents to this research suggested that direct entry and promotion of female senior officers has not yet happened in West Midlands Fire Service.

The timing of the Modernisation Agenda means that the older uniformed workers surveyed in this research have experienced both systems of working, and their reactions to some of the changes have been noted in their answers to the research questionnaire. Some respondents commented that the current training and assessment regime was not as effective as under the previous system, citing the fact that qualifications were no longer a pre-requisite for selection for promotion, and also that prospective firefighters could have training and coaching just to get through the entrance exam. This lack of



underpinning knowledge was said by some respondents (particularly by those who had recently retired) to have led to an increase in risk aversion, as managers were no longer as confident in the competence of their fire crews. However, it was also reported by both uniformed and non-uniformed respondents within WMFS that the training and development that they had gained through the FRS was not always recognised by their managers, who may not have accessed their records to see what skills they had, and what skills could be available to them should they wish to improve the performance of their team. This has resulted in large amounts of money being spent on training that was not always being used to the benefit of the organisation. For example, one former employer reported having undertaken a series of training courses over several years and mentioned this in their farewell email, whereupon a senior manager expressed surprise at their level and amount of qualifications. Uniformed staff are required to maintain competence in the basic skills of firefighting and to record this on their training records, however there has in the past been a lack of diligence on the part of managers to ensure that such records are accurate and up to date. This could have serious implications for the organisation should an accident or failure occur.

A further issue for those working in the Fire & Rescue Service is that of the pension schemes, which have been changed over the past few years and are set to change again in the future. These changes will affect the amount of pensions received as well as the number of years that workers will have to work in order to receive their pension.

### **5.3 The impact of changes to the Firefighters' Pension Scheme**

There are currently two separate Firefighter pension schemes. They are the Firefighters' Pension Scheme (1992) and the New Firefighters' Pension Scheme (2006). A national consultation was launched in September 2011 by the Department for Communities and

Local Government that would see firefighters working for 40 years rather than 30, and paying more into their pension scheme (14% rather than the current 11%), with a subsequent saving to the Government. The likely implications of these changes are discussed in Chapter 7 but it is obviously an unpopular move for the Firefighters. A further aspect to pension changes affects only Brigade Managers, as HMRC changes to Senior Fire Officers' pensions have seen a large number of Chief Fire Officers leave post early to avoid additional taxation on their lump sum pay-outs. This sudden exodus of senior staff could be likely to affect performance of several Fire & Rescue Services, as the tax rules for re-employing Brigade Managers as non-uniformed staff following retirement are likely to make this unattractive for the retirees.

Non-uniformed staff in Local Authority pension schemes expect to be adversely affected by the changes in State Pension Age (SPA), where the male and female SPA is being equalised, and by the increased pension age brought about following the public sector funding cuts of 2010 onwards. The realisation of having to work several additional years, probably 45 instead of 40 years, in order to gain the state pension was mentioned by some non-uniformed staff as adding extra stress to their work. Prior to changes in pensions schemes, non-uniformed staff would typically work for 36 hours per week for 40 years which amounts to 72,000 hours in order to qualify for their pension. Uniformed staff work for 42 hours per week for 30 years which amounts to 56,000 hours to gain their pensions. Senior officers working extra hours on the Flexi-Duty rota would be rewarded by higher salaries and higher pensions.

#### **5.4 The Working Time Directive**

As introduced in the literature review in Chapter 2, the Working Time Directive was passed by the EU in November 1993 as part of its health and safety brief, to restrict the

number of working hours per seven-day period to 48 hours, with specified rest periods and holiday entitlement. As mentioned earlier in Chapter 2, Member States were able to obtain an opt out for a number of professions, including the fire service (Council Directive 93/104/EC). The European Working Time Directive was re-negotiated but still provided some opt-outs (Directive 2003/88/EC). On 17 December 2008 the European Parliament voted through amendments to the Council of Ministers' Common Position on the Working Time Directive (WTD), in particular that:

- the opt-out should be phased out within three years;
- on-call time in the workplace, even when inactive, would be counted as working time; and
- compensatory rest should be taken immediately

This proposed change had been expected to particularly affect retained firefighters, who already work a full time job elsewhere and then worked as firefighters as and when required. A European Court decision (*Landeshauptstadt Kiel v Jaeger* [2003] IRLR 804 ECJ) has already declared that working time should include any time when a worker is "on call" and this could have a major impact for flexible duty officers. Fire & Rescue Services have in the past all been able to opt out from the Working Time Directive and, at the time of writing, the opt out has been retained by the UK government. There has been some concern however voiced over the rights of retained firefighters to work a full time job and then work additional hours for their local FRS and whether that would be contrary to the Working Time Directive (HSE 2002). Negotiations throughout 2012 between the cross-sectoral social partners, particularly those representing public sector employers at European level, on the revision of the Working Time Directive failed to reach agreement by the deadline of 31 December 2012. If negotiations between social partners are not resumed, the expectation is that the European Commission will bring

forward a revised proposal in due course, and therefore this is unlikely to affect the Fire & Rescue Services in the short term. In WMFS the pay, working hours and leave entitlement of firefighters and senior officers would certainly be affected by any changes in the Working Time Directive opt out in the long term. WMFS Human Resources managers reported in 2009 that it had been their intention to try to average out a 48 hour working week over a 17 week period, although this was not mentioned by respondents to the research questionnaire. There was certainly no intention at the time of writing for WMFS to consider self rostering or annualised hours as proposed in Lancashire FRS (LFRS 2004), although this may change in the future. It is clear however that, for an emergency response organisation required to provide a 24 hour service, a sensible balance between the needs of the community and the well-being of the staff must be drawn.

## **5.5 West Midlands Fire Service**

The West Midlands Fire Service (WMFS) is a large Metropolitan service employing, at the time of the research questionnaire, about 2500 staff at 39 fire stations and several specialist centres (e.g. Training & Development Centre, Head Quarters building, and SafeSide community education centre). In WMFS the majority of operational, or uniformed, staff members (1861 out of 2500) were working on Wholetime contracts, with around 65 staff members working on Fire Control (which allocates fire-fighters to respond to emergency calls), and just over 500 non-uniformed staff. There are no retained firefighters employed within this particular Fire & Rescue Service, although across the UK there are about 18,000 retained firefighters operating in over 1000 fire stations. Retained firefighters would normally be employed elsewhere but willing to turn out for incidents, usually for an hourly payment plus time each week for training. Several Wholetime WMFS firefighters take up secondary employment as retained

firefighters in neighbouring Fire & Rescue Services, although these are likely to be younger than those in the research sample. There is a noticeable under representation of women and black & minority ethnic workers across the Fire and Rescue Service nationally, and this is reflected in the research sample.

WMFS was formed from a merger of a number of city and local district fire brigades at the time when local county boundary changes were made following the Local Government Act 1972 and again in mid 1980s. Its activities cover the cities of Birmingham, Coventry and Wolverhampton and the Metropolitan Boroughs of Dudley, Sandwell, Solihull and Walsall. As described on the WMFS website ([www.wmfs.net](http://www.wmfs.net)), it is funded partly from government grant and partly from a precept levied annually on each of the seven constituent metropolitan district councils in the West Midlands area by the Fire Authority. The precept forms part of the Council tax levied by each constituent authority. The Fire Authority is responsible for ensuring that it carries out the core functions set out in Part 2 of the Fire Services Act 2004, which are:

- Promoting fire safety
- Putting out fires and protecting life and property in the event of fires and having the necessary services in place to be able to carry out these duties
- Rescuing people involved in road traffic accidents, and having the necessary services in place to be able to carry out those duties
- Carrying out any other emergency functions as directed by the Secretary of State.

So although WMFS does not have the word Rescue in its title, it is nevertheless obliged to carry out rescues for road traffic accidents, water emergencies, and other rescue situations in addition to preventing and fighting fires. This diverse remit requires a broad collection of skills within the workforce, requiring additional training for a

number of specialist roles for example Technical Rescue and Hazardous Materials officers.

Over the years there have been many internal re-organisations in WMFS, moving management responsibilities from, for example, divisions to stations and then to boroughs. Fire stations have occasionally been relocated or closed following changes to Ward boundaries, which alter due to population changes. The recession in 2008-09 caused the FRS severe economic difficulties, requiring Chief Fire Officers to reduce staff numbers, but the impact of the staff reductions has been lessened by demographic changes and improvements in community fire safety. For example, the number of fire emergency call outs has reduced following changes in lifestyle (e.g. fewer people cooking chips in chip pans, and a reduction in cigarette smoking) and general improvements in the housing stock, such as the compulsory fitting of smoke detectors, have reduced the numbers of domestic property fires. On the other hand, the number of non-fire emergencies such as road traffic collisions, flooding, and even preparation for terrorist attacks, has gradually increased. Nevertheless Chief Fire Officers, along with many other public sector leaders, have attempted to continue to provide the same levels of service with reduced staff even though this is unlikely to be a sustainable strategy (Bartlett 2009), and far more likely to cause considerable stress to the remaining workforce. The public sector mantra of ‘more for less’ has resulted in organisations trying to deliver a wide range of additional activities with fewer staff and yet not seeming to appreciate the additional pressures placed on those workers. This research found that many WMFS employees feel obliged to work regularly in excess of their contracted hours, placing pressure on their work life balance, and this is an issue for the wider FRS as well as other public sector organisations.

WMFS has committed itself to a series of core values which are identified each year in its annual strategic plan (WMFS 2012), including a commitment to its people through the provision of innovative, creative and accountable leadership; recognising, valuing and engaging staff who are safe and healthy at work; organisational development; and reflecting the needs of the community. This commitment has resulted in a number of organisational policies including those that promote wellbeing and work life balance; the effectiveness of these policies was considered in the research questionnaire.

In order to understand some of the work life balance issues facing the older workers in the Fire & Rescue Service, it will be helpful to compare the different levels of responsibility of Senior Officers, main grade Firefighters and non-uniformed staff.

### **Senior Officers**

There have been several changes across all levels of the Fire & Rescue Service in working conditions following the Bain Report (2002): for senior officers, the shift pattern changes in 1979 led to salary increases to reflect increased responsibilities.

Senior officers' hours reduced from 96 hours per week to the current 78 hours per week – known as flexi-duty, and at the same time the number of senior officers increased.

Clearly this number of hours is in excess of the Working Time Directive (FRS staff have opted out, as discussed below), but it includes time spent in unsocial hours on cover overnight or at weekends when an officer may or may not be called out to supervise incidents or act in various specialist roles. The decrease in hours and increase in responsibilities led to a change in the way that senior officers viewed retirement, particularly as their increased salaries (and 20% additional payment for being flexi-duty officers and working unsocial hours) reflected a much increased retirement package.

Their views of retirement are considered in Chapter 7.

The increase in salary led to more senior officers being able to afford to move to larger homes, out of district; and whereas many firefighters started their careers living at or close to their place of work, many now live an hour or more away and the increased travelling time also has work life balance implications. Not all of the Fire & Rescue Services have the same working patterns for senior officers: Lancashire Fire & Rescue Service, as part of their 2004/5 Integrated Risk Management Plan, reviewed their Flexible Duty system to ensure that they were able to cover the community's safety requirements while implementing a family friendly policy and operating within the Working Time Directive. They sought to create a balance between the operational management of incidents and the day to day management of staff and activities by increasing the numbers of flexi-duty officers and ensuring greater weekend and evening cover. Among their recommendations was a plan to create a flexi-time rota with annualised hours and self-rostering (LFRS 2004). Given that most West Midlands Fire Service senior officers are at least in mid-life, if not actually within the band of older workers, the impact of changes to the flexi-duty system could affect their work life balance.

## **Firefighters**

The National Joint Council for Local Authority Fire & Rescue Services (NJC) is the national body responsible for negotiating the pay and conditions of service of firefighters and control staff, and is made up of representatives from local authorities and other employers and the Fire Brigades Union. Agreements reached in the NJC are contained in a scheme of conditions of service known as the Grey Book. The scheme has no statutory standing except insofar as it is incorporated in the contracts of employment of members of the Fire & Rescue Service.



A fire authority is not legally required to employ personnel on NJC conditions but at the current time all fire authorities in the United Kingdom do so. Staff on Grey Book contracts are entitled to join the Fire-Fighters Pension Scheme, and currently receive a pension after 30 years' service (although future changes to the pension scheme will result in fire-fighters being expected to work for 40 years in order to receive a similar level of pension). This change to the pension scheme has proved very unpopular with fire-fighters, although it is inevitable that it will be introduced.

Main grade firefighters usually work 42 hours per week across a variety of shift patterns, but these patterns are known up to 12 months in advance so it is possible for them to plan holidays, child care and family events well in advance. This certainty of work structure could be one reason why senior managers think that main grade firefighters have no work life balance problems; completely overlooking the fact that work is only one part of the equation, and many respondents identified challenges at home leading to poor work life balance.

### **Non-uniformed staff**

Non uniformed staff (sometimes referred to as non-operational staff) work under the terms and conditions negotiated by the National Joint Council for Local Government Services for all local government employees, and this contract is known as the Green book. Staff are able to join the Local Government Pension Scheme, whereby they are currently entitled to receive their pension from age 65, based on 40 year's pension contributions. Non-uniformed are employed on a wide variety of high-level functions including statistical analysis, planning, personnel, health and safety, environmental issues, administration, procurement, together with cooking, cleaning and many others. Many of the non-uniformed respondents to the research questionnaire had worked for

WMFS for most of their working lives, and felt equally committed to providing public service to the community. However there was very little evidence of parity of esteem, and respondents mentioned that inexperienced and untrained uniformed managers were often put in charge of long serving qualified non-uniformed staff, which sometimes caused difficulties for both, and again raised questions of work life balance for some workers.

## **5.6 Work Life Balance policies and procedures**

The development of first the European and later the UK policies to support work life balance has been fully discussed in Chapter 2 and the West Midlands Fire Service complies with its legal requirements. In general it is still the case that public sector organisations are more aware of their statutory obligations regarding implementing policies to improve work life balance (Taylor 2002) however this could easily deteriorate with proposed changes to public sector pensions and working conditions. There are a number of HR policies in WMFS that are specifically designed to facilitate work life balance and well-being, in line with its Core Values (WMFS 2012). For example, WMFS has a very comprehensive Flexible Working Policy, whereby all uniformed and non-uniformed staff apart from new recruits in training may apply for flexible working. However this would appear from the responses to the research questionnaire to be limited by unspecified quotas; and the success of applying for flexible working seemed to depend on the effectiveness, willingness and understanding of the manager. Furthermore a number of respondents said they were not even aware of the policy. Fire stations and other key buildings all have on-site fitness facilities to ensure that staff have the opportunity for regular exercise. While these were originally provided to maintain fire fighter fitness, the facilities are available for all staff, and are now seen as a valuable resource to counter stress (WMFS 2012). Many of the

respondents (47 out of 113) cited the on-site fitness rooms as greatly assisting them in maintaining good work life balance. The provision of easily accessible Occupational Health facilities, staffed by qualified and experienced personnel, was also considered by over half of the respondents to be a major contributor to their work life balance and wellbeing; and the effectiveness of this policy was confirmed in May 2012 by the award of a ROSPA Occupational Health & Safety Award (ROSPA 2012).

Moving onto the results from the questionnaire, the effectiveness of the commitment of WMFS to work life balance was explored in the research where participants were asked to what extent WMFS helped workers to achieve a balance between their work and family responsibilities. This was answered by many people in a very thoughtful, detailed and reflective way, with many acknowledging and weighing the conflicting demands of the individual, their family and the organisation. Twenty-one respondents (18%) said the WMFS was fair in its support for work life balance, 14 said it was very good and 3 that it had improved over the years. However 22 were adamant that the organisation did not help in any way, with 7 believing that WMFS only paid lip-service to staff well-being, and a further 21 stated that they helped very little. Only 4 said they didn't know, and 5 asserted that good work life balance was always the individual's responsibility and not the employer's. The respondents were then asked to consider the impact of the various work life balance and well-being policies on the individuals, and the question was worded as follows:

“Which of the following WMFS policies and procedures have improved your work life balance [☺]? Which have had no impact [☹], and which do you think have damaged your work life balance [☹]”

	Has this policy made a difference?			And how important is this policy to you personally?			
Policy	😊	😐	😞	Very important	Fairly	Not at all	Didn't know about it
a. Flexible working	49	38	10	37	21	27	2
b. Part time working	11	56	12	6	10	54	7
c. Pre-retirement planning	11	67	4	16	23	33	8
d. Semi-retirement	1	60	11	2	7	35	30
e. Reward & recognition	8	52	18	17	15	32	14
f. Flexible duty systems	12	54	13	13	13	42	5
g. Fitness facilities on site	47	38	7	18	29	34	
h. On-site parking	61	27	3	35	29	13	1
i. Occupational Health	65	28	1	11	38	9	
j. Maternity / Paternity leave	17	50	12	6	17	47	1
k. Restricted / Light Duties	32	45	6	12	35	29	1
l. Other family related leave	38	36	11	23	30	22	2
m. Time off for public duties	13	53	12	5	20	42	7

The purpose of this question was to see to what extent individuals found the various work life balance and well-being policies of the WMFS were having an effect. It was anticipated that the results would show that the majority of policies were having a positive 😊 effect on the majority of respondents. But as the results were being recorded it appeared that the reliability of these figures is not so certain: some respondents had interpreted the negative effect symbol 😞 as having no impact, rather than having a negative impact, and it could be that the question was not clear to the respondents. This was surprising as the results from piloting the questionnaire were in line with expectations and had seemed to be easily understood by those taking part in

the pilot. Having said that, the reliability seemed to be greater for the responses for the first column, being those policies that had a positive impact, and of those, it is clear that the provision of Occupational Health, on-site parking at all workplaces, opportunities for flexible working, provision of free fitness facilities, and family related leave including maternity/paternity leave had the most beneficial impact. The final column, for respondents to indicate whether they were aware of a particular policy, seems to be reliable, and raises a question for the Human Resources staff as to how to publicise the policies and how, more importantly, to encourage a culture where making use of the well-being and work life balance policies is the norm.

### **The Importance of Decision Making in the Fire & Rescue Service**

What is the importance of the link between work life balance and decision making in the Fire & Rescue Service? Decision making being a cognitive skill (Flin 2008) it is affected by stress and fatigue among other distractions; so that where a decision is critical to safety, such as at a fire incident, then a stressed or fatigued incident commander could easily make a poor decision that could, in some circumstances, lead to accidents or fatalities. However, when decision makers are aware that they are stressed or fatigued, they can develop additional skills to compensate and try to ensure that their decisions are made safely; hence the importance of training to an advanced level of competence (Flin 2008 p59). In the UK fire-fighter deaths are very rare but always widely reported in the press; less commonly reported are the high numbers of accidents sustained by fire fighters at fires, at fire stations or travelling to incidents, although the figures are published annually by the Department of Communities and Local Government.

The Chief Fire & Rescue Adviser, Sir Ken Knight, himself a former Chief Fire Officer of West Midlands Fire Service, in his contribution to the Skills for Justice Sector Qualifications Strategy (2010 p.18) highlighted the safety critical nature of decision making skills at incidents:

*“The fire and rescue service is somewhat unusual (almost unique) in that the skills (and therefore the training) required of its officers for 95+ percent of the time are the same as any other sector; e.g. training aimed at developing a consultative and inclusive leadership style. However for that 5 percent (or less) of the time that its officers are engaged in often intense and high stakes incident command, then the skill sets demanded of these same officers for command and control are very different.”* (Skills for Justice, 2010)

It is now widely recognised that poor work life balance can lead to stress and burnout (Demerouti et al. 2001; Bakker et al. 2003) and that stress can reduce clear decision making; and poor decisions cost lives. (For example, road traffic accidents are more likely to occur when the driver is distracted.) Given that FRS senior officers tend to work the longest hours, and often live at a greater distance from their place of work, they spend much more time working and travelling to work than they do at home, and yet the quality of their decisions is often crucial to the success or failure of an operation. However, irregular hours and shift working at all levels in the organisation are likely to build up to cumulative fatigue level where decision making can become unsafe. In a comparable example, the UK Health & Safety Executive have found that levels of fatigue increase with even 3 consecutive early shifts, and that by the 7th consecutive early shift there is a 75% increase in fatigue (Heffernan 2011). While few Fire Service employees are timetabled to work 7 consecutive early shifts, there is a large number of flexi-duty officers who report that they are regularly working more than their contracted

hours, often working their rota days, and may sometimes work 12 consecutive days without taking a day off, and these are the people whose clear, reliable decisions are very important to the safety of the wider workforce.

### **WMFS and work life balance**

Did staff members take work life balance issues into account when deciding whether to join and whether to remain in employment with the Fire Service? The motivation to stay was, for this research, more pertinent, as the research was looking at people in their final years of work, however it seemed appropriate to enquire why people joined before asking about their reasons for staying. Some people make career plans that can lead them into work that either enhances or decreases their work life balance at the end of their career (Green 2010). From a life-course perspective, it also seemed important to judge whether any of their decisions taken several years ago had an impact upon their work life balance issues experienced in the present time (Hutchison 2010). Individual respondents had joined the Fire & Rescue Service for many reasons. Several respondents (n=9) had friends and family who already worked in the Fire & Rescue Service, and they knew what to expect in terms of both the shift working and also the close bond of working with others on the same watch. This follows the national picture (CLG 2008) where 58% had stated that friends or family were already in the Fire & Rescue Service when they joined. From a life course perspective this is interesting as it suggests that the prior experiences of friends and family have had an influence upon career choice, at least for some. However it is also clear that many young entrants to the Fire & Rescue Service were not fully aware of what the work would be like, or of the implications of shift working on their future domestic lives, and this transition into work was for some as uncertain as the transition out of work and into retirement (Goodwin & O'Connor 2012)

Other respondents cited reasons such as steady work and good prospects; convenience of working or not working shifts ; wanting to be of service to the community, and for a few the motivation was sensation seeking:

*How else could I go into fires...? (23-M-U)*

Only 21 respondents (7 female and 14 male) said they had considered work life balance when deciding to join although, as the mean length of service is 20 years, that is hardly surprising; previous research has shown that young people rarely think about work life balance in their later years when seeking employment (Hutchison 2010, Green 2010). Several (8) stated that they found the idea of shift working or flexi hours very attractive, while some others (7) said they needed shifts or part time work to fit in with their family arrangements. A few respondents said they were already used to working shifts in a previous job, or that they had been happy to work shifts when young and single, even though that may have changed as they got older. Some also said that shift working at the age of 18 or 19 had not been considered hard work at the time, implying that working shifts had become harder as they got older.

When asked why they had decided to continue to work for WMFS, 52 respondents (46%) stated that they loved or enjoyed the job, or gained significant job satisfaction, with another 12 mentioning being of service to the community. A further 15 felt loyalty to an organisation that had provided them with training and a worthwhile career.

However 39 respondents (34.5%) claimed that the Pension was a major part of their decision to stay, with some talking about feeling trapped within an organisation whose culture had changed, but as they only had a specific time left to work they would remain and claim their full pension. This feeling of being trapped by the pension arrangements accords closely to the findings from the CLG survey in 2008, where many respondents



referred to simply counting out the days left to work. This is likely to change in future as the pensions regulations have undergone considerable restructuring, resulting in fire-fighters working more years for a reduced amount of pension. While fire-fighters themselves feel very aggrieved by this, it should be noted that the Firefighters' Pension Scheme is still more generous than most other public sector workers' schemes, such as the Local Government Pensions Scheme, Teachers Pension Scheme and the NHS Pension Scheme.

Although the decision to remain with WMFS was, for many, not made with reference to work life balance, there were 25 respondents who did consider work life balance issues when deciding whether to remain with WMFS:

*I would only want to work for an organisation that offers flexi-time. (26-F-S)*

66 respondents (58%) said they did not consider work life balance issues when deciding to remain with the organisation and many displayed a very pragmatic attitude to the job. However there were some who acknowledged that they had changed their patterns of working to get more family time and had benefitted as a result, or intended to benefit soon from the early retirement date:

*No – by staying and taking retirement at 50 work life balance can be adjusted  
(35-M-U)*

There was a strong difference in the answers to this question from the uniformed and non-uniformed staff, as some of the non-uniformed staff were deeply attached to the flexible working opportunities in addition to the other reasons for remaining at WMFS.

A national survey of current and ex-firefighters in England – The Fire Research Technical Report 8/2008 published by Department for Communities and Local Government (CLG 2008) – looked at the experiences of firefighters in the 46 English FRS, by sampling all female firefighters and a proportion of male firefighters. While that report does not specifically use the phrase ‘work life balance’, the responses to many of the CLG questions on other stress issues may offer a useful comparison with the responses to the current research questionnaire, discussed more fully in Chapters 6 and 7. For example, a large number of the CLG respondents intended to leave the Fire & Rescue Service due to dissatisfaction with many of the FRS practices, citing the lack of transparency and favouritism involved in the promotion process, poor management particularly by senior officers, and unacceptable behaviour such as bullying and harassment. These ‘dis-satisfiers’ are very similar to those expressed by the research questionnaire respondents as contributing to high levels of stress and poor work life balance in WMFS.

Considering the classifications offered by McNair (2006), some of the older workers wishing to remain in the Fire & Rescue Service were ‘choosers’, some were ‘survivors’ and others were ‘jugglers’. Choosers were the better qualified, more likely to be in supervisory or management roles, and felt confident in their abilities to continue working until they chose to retire. Survivors were those who were, in the words of one respondent “hanging on until the retirement date”, often less qualified, less satisfied with the workplace, and more likely to face redundancy or early retirement through ill-health. Jugglers, a term often used by respondents when considering the many roles they had to play at work and home, were those making a very conscious effort to balance or blend their work roles and family responsibilities in order to continue working for as long as possible.

The role of the manager in improving or damaging work life balance and well-being at work was mentioned several times by respondents, and this is borne out by many other research studies (Skakon et al 2010, Alfes et al 2010). A recent review of the available evidence concluded that: *“sufficient data have now accumulated to allow the unambiguous conclusion that organisational leadership is related to, and predictive of, health and safety-relevant outcomes in employees”* (Kelloway & Barling, 2010 p 275)

When asked about the effectiveness of work life balance initiatives with WMFS, eleven people mentioned the influence of the personality of their manager as to whether all the policies were put into practice consistently. Fourteen commented on the beneficial effects to them and their families of flexi time, but seven respondents felt it depended on who they or their manager were, their gender or rank within WMFS, and even which management clique their manager belonged to. However, in a later question, 29 respondents (25%) agreed and 75 (66%) disagreed with the statement: “There is strong management support for work life balance in WMFS”. This raises questions as to why there is a difference in the two sets of responses. It could be that the policies are appreciated, but the organisation does not encourage their take-up. Or maybe the lack of management ability or consistency is the cause.

## **Conclusion**

The importance of the role of the manager in supporting good work life balance was mentioned throughout many of the answers to the questionnaire. Of course, the answers will depend on whether the individual has any work life balance issues, and whether they believe that their organisation should be or will be of help, or whether there would be little point in asking for help. This is a very structured, male-dominated organisation, where asking for help can sometime be seen as admitting a weakness, and therefore

could limit their career prospects. This is explored in more detail in the findings in Chapter 6. Poor and even abusive supervision and management has been associated with lower job and life satisfaction, conflict between work and family, and psychological distress (Tepper 2000) and there have been some instances of very poor supervision reported by a few respondents to this questionnaire. Some of the responses seemed to suggest that it all depended on which 'clique' their manager belonged to, as to whether they could rely on good management.

From a life course perspective it is clear that continuity is very important to both uniformed and non-uniformed staff in WMFS; many joined because they had friends and family already working for the organisation, and there was a clear intention among many respondents to continue working for WMFS until they retired. One of the other elements of life course analysis, that the age of a person may be measured as a biological, psychological, social or spiritual age (Hutchison 2010) is explored further in Chapter 7, on Retirement issues. The following chapter considers in greater depth the responses to the research questionnaire.

## **Chapter 6**

### **The experience of work life balance**

#### **6.1 Introduction**

Linking back to the discussion on definitions in Chapter 2, it is the case that work life balance, however defined, contains an intrinsic assumption that there is a right and wrong; that some people enjoy what they call good work life balance and others have poor work life balance; and even the word ‘balance’ suggests that there should be some form of equilibrium (Taylor 2006 p6). The following results suggest that some respondents buy into this assumption and report that they have a poor work life balance, or do not feel in control of their work life balance.

A further issue considered here is whether the individual and somewhat subjective responses to questions on what makes work life balance ‘good’ or ‘bad’ can be brought together to create an overall picture for an age cohort or a group of staff within an organisation, which was first raised in Chapter 2. If this is possible then it should be useful to Human Resources staff in reviewing the effectiveness of the organisational policies for wellbeing and work life balance, and providing policies that meet the needs of specific groups of staff rather than an overall policy that meets the needs of very few.

This chapter is focussing on the responses to the work life balance questionnaire sent to the older workers in West Midlands Fire Service, picking out some of the recurring themes that became evident from the responses and interviews. The work life balance issues that arise around preparation and transition through retirement are then considered in the following Chapter 7. Older workers are often thought to be over 50

but, for this research, it includes employees aged 45 and over; fire-fighters tend to retire in their 50s after 30 years' service, and so it was deemed important to gain the thoughts of those in their final 5 to 10 years of work in order to gain an insight into their preparations for retirement. The research participants were mainly current or past employees of the West Midlands Fire Service, from across the whole organisation and represented nearly all of the job roles as set out previously in Chapter 5 on the Fire & Rescue Service, and therefore offer an in-depth view of the perceptions of work life balance held by older workers within one public sector organisation of around 2500 employees. This provides an unusual opportunity, as many organisational research projects on work life balance look only at groups of individuals within certain roles or at certain levels of seniority (Chang et al 2010) and may miss the bigger picture that affects the whole organisation. Life course analysis suggests that people can make choices and construct their own life journey by reacting to the opportunities and constraints that face them (Hutchison 2010) and this is an opportunity to explore whether that was the case within this organisation.

While most of the uniformed respondents were aged 45-55, there was a much wider age range from the non-uniformed staff as they are employed under normal local authority contracts of employment, and expect to work until Statutory Pension Age which, at the time the questionnaire was distributed, was 65. While there was a significant number of older uniformed workers responding to this study, the majority of employees over 50 in West Midlands Fire Service were non-uniformed. The proportion of older workers in the Fire & Rescue Service is lower than most other public sector organisations, mainly due to the fact that the majority of staff are uniformed and their contracts currently set up an expectation for most of them to retire in their 50s or after 30 years' service (see chapter 5). Changes to the Firefighters Pension Scheme, however, mentioned in Chapter

5 and further discussed in Chapter 7, will have an effect upon the proportion of older workers in future, as firefighters will be expected to extend their working lives to 40 years' service in order to receive their pension, and therefore there will be more older workers throughout the Fire & Rescue Service in coming years. This increase in the proportion of older workers may impact upon the design and implementation of organisational policies in the future, and makes the findings of this research increasingly important as the working population ages.

## **6.2 Self-perception of Work Life Balance**

In the questionnaire, the first section asked individuals to consider how they viewed their own work life balance. Perception was considered to be crucial to how individuals reacted to and described their circumstances, so their own views, words and metaphors were important to record. While an individual might over-estimate or under-estimate the relative value of their work life balance, or of other aspects of their work or life, it is still their subjective opinion of how they are dealing with their current situation, and therefore should have as much validity as some type of objective measurement. Within the life course, it is suggested that people make decisions and assess their circumstances through the lens of family life (Hutchison 2010). Therefore the individual respondents were invited to add personal comments to some of the yes/no questions, in order to understand their individual perspectives.

### **6.2.1 The meaning of “work life balance” to the respondents**

Why is a definition of work life balance important? It is a very widely recognised phrase yet has a wide variety of meanings to individuals, academics and politicians (Bailyn & Harrington 2004, Neault 2005, Taylor 2006). As discussed in Chapter 2,

some definitions relate to family life and others to a general sense of well-being. The words people use and the metaphors they adopt to describe their situation, such as “spinning plates” and “juggling”, shows the different levels of concern and control over their own work life balance, and whether individuals are being pro-active or re-active in response to their personal situation (Lakoff & Johnson 1980, Dunbar 2005).

Respondents also used a number of metaphors when describing their work life balance in the approach to retirement, which are discussed in the next chapter. The questionnaires and later interviews demonstrate that reactions to work life balance issues are always a very personal and subjective issue, and a substantial number of the later responses suggest that some of the organisational and legislative policies designed to improve their work life balance do not seem to meet the requirements of individuals in the latter part of their working life. The employer has, like many other organisations, adopted a “one size fits all” approach to work life balance and wellbeing. While some employers might suggest that providing policies specifically for older workers could be seen as being discriminatory, this is not actually contrary to the Age Discrimination legislation (Parry & Tyson 2009). From the perspective of analysing the life-course, it would seem that the individual response or reaction to any situation or transitional occurrence may depend on the past experiences of that individual (Lakoff 1973), and therefore any organisation could benefit from listening more closely to the views and concerns of its individual employees.

113 responses from WMFS (and 25 from Networking Women in the Fire Service) yielded a total of 138 personal definitions of work life balance, for example:



- *To me, it means quality of life, we need to work to live, not live to work. I feel time with my family is very precious & important. (18-M-U)<sup>2</sup>*
- *The ability to maintain my private/family interests and responsibilities and those required by my employer in parallel and to feel content that I am giving both adequate attention and able to achieve satisfaction from both. (56-F-S)*
- *Being able to do other things you want to do without feeling guilty – whether its friends, family or even the shopping without guilt. It's constantly over your head. (1-F-U-NWFS)*
- *This is where my employer takes into account that I have a private life that is important to me, and I have a responsibility to consider my employer when I am planning my private life (104-M-U)*
- *If I have a good work/life balance, I will work the hours I am contracted to work and more when required, and still have enough 'quality' time with my family to enjoy being with them and doing things with them as they grow and develop. (112-M-S)*

The wide variety of responses follows the very wide variety of definitions offered by academics (Bailyn & Harrison, 2004, Neault, 2005, Taylor 2006), social commentators and politicians when trying to devise a simple phrase to describe a complex set of circumstances on which there are very subjective views (The Work Foundation, 2006 p 14). The definitions and the words used by the male and female participants indicated few substantial gender differences; likewise there were no obvious differences in the responses from uniformed and non-uniformed staff. The responses were not simply about sharing time between paid work and the rest of life – many show a real desire to

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<sup>2</sup> Each respondent was identified by a number corresponding to the order in which they were received and logged, then M or F for their gender, and then U for uniformed, S for support staff and R for retired.

do a good job for the employer as well as caring for their family, and understand the needs of the employer to maintain a 24-hour service to the community, but also include a concern about balancing home with an increasing work load:

*Being honest, the reality is different to the theory. Too much to do, too little time means working at home after the end of duty is a norm. Weekends is often catching up with onerous emails. God forbid you take leave as this is exacerbated ten-fold when you return and attempt to play catch up. 500+ emails is not uncommon after a week or so on leave (70-M-U)*

These responses correspond quite closely to the previously quoted definitions such as “the extent to which an individual is equally engaged in—and equally satisfied with—his or her work role and family role” (Greenhaus, Collins & Shaw 2003 p513).

However, the quotation from the response above regarding the difference between theory and reality is revealing; although many respondents understood what work life balance meant as a concept, they were also aware that this was something they personally had yet to achieve. And it may be that in a busy public sector organisation, constrained by financial cuts and staffing reductions, work life balance is unlikely to become attainable for some. There are still some employers (Glynn et al 2004) who believe that their responsibility is only to provide a job and the employee is responsible for managing their own life, and this is particularly the case since the 2008 recession (Rafferty 2010). This is more common in the public sector, which operates under the mantra of ‘providing more for less’ (Bartlett 2009) where workers are likely to be expected to take over the work load of their redundant former colleagues, regardless of their capacity to do so.

53 participants (47%) considered themselves to have a satisfactory work life balance; 16 (14%) stated they did not have a satisfactory work life balance, and 44 (39%) said that their work life balance was satisfactory only sometimes or occasionally. This question was an early invitation to the participants to start thinking about their own perceptions, and comment on their personal situations, as well as an opportunity for the researcher to compare these answers with later ones (Bryman 2004). This was important to gain a more balanced picture, and discourage respondents from supplying the answers that they thought might be expected. The majority reported that they did have a satisfactory work life balance; with very few describing it as unsatisfactory, despite several negative comments later in the questionnaire. On the other hand, some of the retired respondents and interviewees mentioned the fact that, following retirement, they found life much less stressful. Even those who had returned to work for the fire service in a non-uniformed capacity mentioned the reduction in stress and pressure to work long hours and yet the majority of employed respondents had said their work life balance was satisfactory. Why is there a disparity? It could be that individuals do not realise that they are under pressure until the pressure is lifted, or it may be that this rather male dominated organisation is not an easy place to express concerns about work life balance. Nationally and locally there is a very wide gender imbalance and this creates the risk of a 'macho' culture; across England and Wales less than 5% of firefighters are female (DCLG 2011), and the vast majority of women firefighters nationally are Retained (i.e. part time) rather than Whole-time. As set out in Chapter 5, at the time of the questionnaire, WMFS had a total staff of 2500 and all the fire-fighters were on Whole-time contracts. One-fifth (501) of WMFS employees were female, with only 75 female firefighters and nearly 1800 male firefighters. The culture within the organisation is competitive and militaristic, with a strongly delineated rank/role

structure and uniformed managers being referred to as Commanders, and this too may provide a negative influence against a respondent's readiness to seek assistance with their work life balance or even to consider work life balance as an issue. Indeed, one or two respondents said this research questionnaire was the first time anyone had asked them about their work life balance. That is not to suggest that the organisation is uncaring with regard to the well-being and work life balance of its staff; WMFS offers a generous flexible working policy that 49 (43%) respondents found to be most beneficial. In theory all staff members are entitled to ask for flexible working, although fewer men and fewer uniformed staff seem to take advantage of the policy. Some of the responses suggested that the culture of the organisation does not encourage take-up, although it could simply be that some managers are unaware of the ways that flexible working could be performed within their departments. However 65% of respondents felt their line manager would help them if they needed to work flexibly. This of course suggests that the remaining 35% did not believe their managers would offer help should they need to work more flexibly, which again reinforces the argument that the attitudes and behaviours of line managers are a significant factor in improving or damaging the work life balance and well-being of the staff (Vickerstaff 2006, Kelloway & Barling 2010).

Delving a little deeper into the concept of satisfactory work life balance, the participants were asked whether they felt in control of their work life balance. Control of work life balance, or at least the perception of control, is one of the positive elements in the Job Demand – Job Resources model (Mostert 2011) that can reduce the risk of stress and burn-out of employees and improve work life balance. The more control that an individual feels they can exercise over their job, or their hours, the less stressed they are likely to become. 55 (49%) respondents to the questionnaire felt they were in control of

their work life balance; 20 said they did not feel in control, and 38 responded that they only felt in control sometimes.

*It is difficult..... I feel that am not really in control, even when I'm not on duty or on call (I am contracted to do a number of days 'on call' annually and even if I get someone to cover me, I still have to repay the favour to ensure I do the right number of days) as my Wife also works nights, so we [are] invariably apart most of the time. It's also not easy getting holidays off at the same time. (78-M-U)*

Perception is an issue that arises several times throughout the questionnaire; whether respondents feel that they are in control, whether they work longer hours than contracted, whether they feel supported by their managers or by the organisation.

Perceptions of good work life balance, even if the perception is not accurate, can lead to an improved feeling of well-being (Hill et al 2001), and perceptions of poor work life balance would lead to a reduction in well-being. While half the respondents stated they sometimes or always lacked control over their work life balance, in later questions three-quarters stated that they felt under some pressure to work longer hours than their contract required, and one-quarter fail to take all of their annual leave, rota days and toil. This suggests that perceptions and feelings about work life balance are not only subjective but are also variable, and this accords to the life course analysis approach of individuals assessing their circumstances in the light of their previous experiences (Hutchison 2010). This is why the questionnaire was supplemented by follow up email questions and by interviews, so that the individual's perceptions of their personal situation at different times could be analysed in more detail.

### 6.3 Second Shift Activity

Having decided to define work life balance as the division between paid work with WMFS and everything else, it seemed proper to guide respondents to consider that division. So the respondents were asked, *“If I were to describe your regular paid work with WMFS as your ‘first shift’, what would you describe as your main ‘second shift’ activity?”* This question was designed to identify whether there were some work life balance issues that were specific to this age cohort and many respondents had a wide variety of caring and other responsibilities to deal with at the end of the working day. Not all respondents were happy with the idea of first and second shift; some felt they had not one but several extra shifts after the end of the working day, particularly those respondents with parenting or other caring responsibilities. Guest (2002), quoting Hochschild and Machung, (1989) suggested that many working women go home to a ‘second shift’ of housework and parenting, and this was still found to be true among the research sample: 84% of the female respondents (22) and 65% of the male respondents (56) mentioned family responsibilities, with 19 of those also mentioning looking after elderly relatives. Hochschild and Machung (1989) suggested that the more household responsibilities that a woman had, the less able she would be to balance work with family life. Following that concept, those respondents (both male and female) who had multiple responsibilities in their second shift would have been expected to report higher levels of dissatisfaction with their work life balance. However, as times have moved on, the dissatisfaction seems to have equalised between men and women, and between those with many responsibilities and those with only one activity in their second shift. This change was predicted by Hochschild and Machung (1989), who had suggested that women from different generations were likely to experience different pressures in balancing home and work life. Several respondents (n=22) provided details of their

family commitments, including the financial burden of their children's out of school and academic activities. Others described their voluntary activities or the courses they were studying. Very few respondents indicated only one activity as their second shift.

	'Second Shift' Activity (tick all that apply)	Male 86	Female 27
A	Family responsibilities	56 (65%)	22 (84%)
B	Children?	42 (48%)	14 (51%)
C	Parents?	14 (16%)	5 (18%)
D	Both?	14 (16%)	4 (14%)
E	Other?	16 (18%)	2 (7%)
F	Housekeeping	41 (47%)	7 (25%)
G	Voluntary activities	15 (17%)	4 (14%)
H	Social activities	42 (48%)	15 (55%)
I	Studying	12 (14%)	3 (11%)
J	Other paid employment	6 (7%)	1 (3%)
K	Self-employment?	3 (3%)	1 (3%)

Only 25% of female respondents mentioned housekeeping as their second shift activity; it seems unlikely that the other 75% did no housework, but it may be that housework is so normal that it was not even considered, or that they had already mentioned family responsibilities and felt that housework was part of that. Only 11 respondents mentioned additional employment, and there may be a number of reasons for that: additional employment may no longer be as financially important to fire-fighters as it once was, or they may not want to disclose their additional work. Traditionally, many main-grade fire fighters engaged in other paid work, sometimes an entire watch would be involved, for example in landscape gardening or painting and decorating, during their days off. Following the various pay increases mentioned in Chapter 5, this may have reduced the need to work two jobs. A few employees are also employed by neighbouring Fire & Rescue Services as part time Retained firefighters. West Midlands Fire Service employs no retained fire fighters, although most of the neighbouring rural fire services rely heavily upon their sizeable retained workforce (see Chapter 5).

Asking the participants which shift was most important to them was designed to get respondents thinking about their priorities, so that they could later consider whether they found their “balance” satisfactory or a problem. 60 respondents (53%) said that their second shift (family) was most important, and several mentioned the priority they accorded to their family. However 21 commented that they could not adequately look after their family without earning the money, so the first shift (i.e. paid work for WMFS) was more important and 17 respondents claimed that both were equally important to them:

*Both equally. If you have a good, happy first shift, [this] reflects in the second shift as it doesn't manifest itself as stress/worry when not at the first shift. (96-F-S)*

Bailyn et al (2001) have noted that some individuals like to keep a very strict boundary between their paid work and other activities, whereas others are very happy to blend the different parts of their lives. When asked, 74 respondents (65%) preferred a strict boundary between work and home, whereas 33 did not. These responses highlight the difference between the two concepts of work life balance and work life conflict. The phrase ‘work life balance’ tends to suggest that there is an opportunity to gain some form of equilibrium and even that spending time on one aspect of life will have a beneficial effect upon other aspects of life (Hopson 2009). And yet many of the comments from respondents suggest that they are really considering ‘work life conflict’ or at least that there was a potential conflict between the time spent at work and the time spent with family. Some felt that when there was a conflict, it would be the family that would lose out. If the experience is mainly of conflict, there is the potential for job strain when their employer asks them to put in extra work, or work harder, or expand



their role to cover the work previously carried out by others. On the other hand, if the perception is of a beneficial work-life 'blend' then the individual will see additional duties as an enhancement to their role as set out in the following comment:

*I [perform my role] to the best of my ability and as I don't make many personal / private life commitments I am free to work as long as I like. I am conscious of burn out and therefore I try to take time off when [my line manager] is either away or out of office. I am aware of when my private life suffers due to work commitments. My manager never insists I stay late or go early, and does always remind me to take time out when I can. NB If you enjoy your job and [it] provides you with opportunities and a social side then it becomes more a "work/life blend" than a balance... (108-M-U)*

Whether or not participants see this as a balance, a blend or a conflict, there is still the potential for the activities of one shift to affect the other, and this was the subject of the next question. 70 respondents (62%) said that their paid work duties often affected their ability to engage fully with 'second shift' activity such as parenting responsibilities or social activities. While this accounts for nearly two thirds of the total responses, there was a gender difference: 37% of women and 69% of men reported that first shift, i.e. paid work, had a negative impact on their second shift. This answer could be influenced by different modes of work attendance; the majority of the male respondents are uniformed and working full time on various shift patterns, whereas the majority of female respondents are non-uniformed and many work flexibly or part time and so may be able to balance their work and family life more easily.

However 38 respondents (27 male and 11 female) claimed that neither shift affected their abilities to perform the other shift, with just 2 respondents offering ‘Sometimes’ as an answer:

*The ‘first shift’ provides me with some independence and earning power which enables me to do my ‘second shift’ better but it can get difficult when your child is ill or off school for some reason... (36-F-S)*

The respondents offered a number of reasons for this situation, such as the size or pressure of workload, particularly for those in senior positions:

*Taking work home is a problem and never switching off. (20-M-U)*

There were also issues around working shifts, particularly night shifts;

*Fire service shifts of weekends and nights can interfere, but that is part of the job. I am tending to struggle with nights as I get older (17-M-U)*

The challenges facing older workers on night shifts has been highlighted many times over the past years (Koller 1983, Harma & Ilmarinen 1999, Bohle et al 2010) which suggest that the health of older shift workers could be at risk. This raises issues for the Fire & Rescue Service which have yet to be addressed, particularly once the abolition of the Default Retirement Age takes effect and uniformed staff will be working longer, often well into their 60s. Those respondents with family commitments and particularly those with younger children (often from second families) reported a general difficulty in balancing their responsibilities for work with those of the family, and it would appear that the more second shift commitments a person had to deal with, the less able they were to cope with added pressure at work, for example:

*Unable to have quality time with family, end up rushing around at weekends.*

*Loads needs doing to the house, putting off until retirement from WMFS [in] 11*

*½ months. (9-M-U)*

There are high levels of divorce and remarriage within the Fire & Rescue Service (Wagner & O'Neill 2012) and so a large number of older workers have young children from second families, which creates additional work life balance challenges for those parents. Respondents reported that some of the younger managers appeared not to understand that older workers might still have parenting responsibilities, and could be less sympathetic to the need to work flexibly or take annual leave during the school holiday period. Is there a direct link between poor work life balance and relationship breakdown? Mostert (2011) considered the links between work life balance, which she described as being good or bad Work Home Interface, stress and job design, and could describe links without being able to say which aspect had caused which result. But while it may not be possible to attribute work life balance to relationship breakdown or vice versa, it is certainly the case that respondents often struggled to balance the expectations of home life with those of work. When asked whether they were prepared to sacrifice family life to fulfil responsibilities to WMFS, only 17% said they would, and some qualified their answer by saying they had done in the past but were less likely to do so in the future.

Again there is a difference between those who view the work-family interface as a blend or balance between first and second shifts, and those who see it as a conflict. Despite stating that family life is more important than work, the majority of respondents (70) reported that work interferes with their family life and prevents them from spending as much time with their children and friends as they would like to, leading to

work-family conflict. This closely accords with much of the earlier research (Bailyn & Harrington 2004, Byron 2005, Wattis et al 2006) and seems to remain the norm for many full time workers. However, those respondents who did not feel that one shift affects their abilities to perform the other shift were more likely to speak of a “work life blend” and of the benefits to each shift of the other:

*I sometimes chat about work on the phone during down time in the evenings.*

*This doesn't stress me at all. I enjoy being able to blend work with home. I also discuss work with my wife a lot (mine and hers) and we find this an OK pastime though not all of our social time is taken up with this. (65-M-U)*

This suggests that while some respondents view the idea of work life balance in terms of conflict between paid work and other activities, where usually it is family life that is the loser, others consider their ability to manage their work life balance more positively in terms of enhancement. Again this accords with the life course view that people interpret the wider world through the lens of their family life (Hutchison 2010). This personal and subjective view of work life balance continued into the next question of “what makes your work life balance good or bad at present:” As previously discussed in Chapter 2, the notion of work life balance is very subjective and therefore it is to be expected that personal experiences of ‘good’ and ‘bad’ work life balance are equally diverse. One respondent spoke of the conflict between having enough money to do the things they want to do, and not having enough time to do them (39-F-S). Another stated that shift working was what was both good and bad about the job (48-M-U). It is clear from the wide variety of answers to this question just how subjective work life balance is to the respondents. The ability to work night shifts was said by several to be beneficial to family life as they could spend time with the children, take them and

collect them from school, deal with children's illnesses etc. Those whose children were grown up mentioned enjoying the added time spent with a partner, or with friends. However while some find shift working very beneficial, providing them with time to spend with their family, it is clear that others find it very debilitating, especially those who regret the removal of beds from fire stations. This removal of the beds is a constant sore for some fire fighters and crew managers – as it prevents them from sleeping during the night shift, so they are often too tired to enjoy being with their family or follow additional employment, and need to spend the day after their night shifts recovering.

*[The removal of adequate] rest facilities on station have damaged my work life balance and damaged my health (98-M-U),*

This was particularly reported by the older uniformed respondents, who found that it now took longer to recover from their night shifts. It would appear from conversations with serving firefighters and officers that it was the manner of the removal of the beds that is as much a continuing bone of contention as the removal itself. A speedy management decision, with no consultation, was still being resented several years later, and impacted the organisational culture of a deep division between main grade fire fighters and managers.

Although some of the early research on the effects of shift working on older workers was equivocal (Smith et al 1998) later authors (e.g. Bohle et al 2010) have suggested that older workers take longer to recover from irregular shift patterns such as those worked by WMFS. Skinner et al (2010) contradict this by suggesting that the age group most likely to suffer fatigue from long working hours and irregular shifts are slightly younger at 34-44, although men generally are more likely to take longer to recover from

shift working patterns. Several respondents (n=14) commented throughout the questionnaire on the increased recovery time needed after night shifts now they are getting older, and that the lost family time was detrimental to their work life balance.

Some respondents offered a list of what makes their work life balance good:

*Security, Fellow workers, Being close to work (travel), Sense of being a useful part of the community, Helping young people. Occ[upational] health.(18-M-U)*

*Leave, 9-day fortnight, pension in 3.5yrs time, good working conditions, challenging but rewarding work (58-M-U)*

*Manage my own time. Set a lot of my own objectives in consultation with line manager. Family grown up and getting more self-sufficient. Financially more secure (86-M-U)*

These responses suggest that work life balance is not simply a matter of good work or good home life, but a rich combination of factors which, when taken together, result in a more positive outlook and feeling of well-being. However work and home also figure largely in the responses; 32 respondents (28%) reported that the flexible working arrangements made a positive contribution to their work life balance, and an equal number mentioned having a supportive partner or family as being important to their well-being. This supports the life-course view that individuals will view their circumstances through the lens of family life and their prior experience (Hutchison 2010).

When identifying what was bad about their work life balance, 18 respondents spoke of increasing work load coupled with reduced resources:

*Doing three times the work of 10 years ago. Fitness suffered, relationships suffered, temper suffered (9-M-U)*

*Emails, too much work, unrealistic expectations (at work) of what can be achieved at work with the resources allowed, ... (56-F-S)*

Other suggested causes of bad work life balance included poor management, as well as general insecurity over the future:

*Poor communication from line managers, concerns over cuts, concerns over pensions, short staff on my team (58-M-U)*

*Poor decisions by Brigade management that allow ill-informed personal preferences to dictate the design and functionality of corporate applications.*

*Disregard of my professional experience and advice. (56-F-S)*

This goes straight back to the very early theories of motivation as espoused by Herzberg (1966) where some aspects of work act as motivators and others as demotivators or hygiene factors. The current motivators include on-site parking, on-site fitness facilities, flexible working policies as well as rewarding work and a generous pension. The hygiene factors include poor communication, bullying by managers, increasing workload, lack of appreciation or respect and job insecurity particularly for the non-uniformed staff. Given the fact that Herzberg's work has been discussed on management courses for over forty years, it is disappointing that so many organisations fail to grasp its implications. These responses also link to recent work by Mostert (2011) in considering the connection between poor job resources, long working hours, and poor work-family interface, all of which increase the likelihood of fatigue, burnout and cognitive weariness which can lead to accidents and illness.

However many of the responses also mentioned changes in personal circumstances that had impacted upon work life balance. These included moving further away from the place of work, so that travelling time had increased; changes in family structures; taking up studying or additional voluntary work; being restricted to school holiday times and wanting to help children with their exam revision. This suggests an implicit understanding among the respondents that their work life balance includes family life as well as workload, and this was confirmed in a later question.

Wishing to establish whether the impact of work life balance issues increased or decreased over time, and as people got older, the respondents were then asked to identify whether and, if so, how work life balance had changed over the previous few years 40 people reported that their work life balance had got better or much better, 45 said it had got worse, or much worse, 23 said no change and 5 others didn't say.

Much better	Better	No change	Worse	Much worse
12	28	23	34	11
(11%)	(25%)	(20%)	(30%)	(10%)

12 respondents stated that work life balance was now much better:

*As I have stated before since joining the WMFS the amount of free time I have with my husband and to pursue my interests has improved due to the shifts. I would find it very difficult to go back to working 9 – 5 (10-F-S)*

As with the question on what makes work life balance good and bad, this answer reflects the position regarding shift working; many of the respondents indicated throughout the questionnaire that they found shifts to be a beneficial way of working. However if working on a shift system was said by some to improve work life balance



there were several others who found the opposite applied, particularly after working a night shift and taking longer to recover as they were getting older.

28 noted some improvement in their work life balance over the past few years

*I have taken charge of how I manage work and take time to smile and enjoy what I'm doing. I know that I'm good at what I do and I know my knowledge and life-skills are valuable. Away from work I've become more forgiving of myself and the people around me. There are still down times but now I manage more effectively I have the capacity to step out the loop and offer solutions. (53-M-U)*

The ability to stand back, take stock of a situation and then react seems to have been of help to some respondents, who now appear in more control of their work life balance.

23 said there had been no noticeable change:

*About the same just the subject areas have evolved (8-M-S)*

34 said their work life balance had deteriorated over the previous few years:

*My workload has increased. I cannot do everything that is expected within 36.5 hours. My commitments at home mean I cannot stay in the office for extra long hours so I take work home with me and do it in the evenings when my children are in bed (13-F-S)*

And 11 felt their work life balance was now much worse:

*Working at home [has] dramatically increased. Rota days [are] cancelled frequently due to work requirements. Evening meetings [have] increased to catch up with personnel matters (70-M-U)*

Closer examination of the responses suggests that those respondents who reported an improvement had taken matters into their own hands and been very pro-active about their work life balance issues, and had also dealt positively with some of their other life transitions. Those who felt their work life balance had deteriorated pointed to suffering from increased work load and changes in work patterns as well as the prospect of redundancy among the causes. Those who were intending to retire in the next year or so, and had stopped trying for promotion, seemed to be happier with their situation, and more relaxed about their ability to complete all the tasks expected of them. For those who were still striving for promotion there seems to be an expectation that they should put in extra time and work much longer than their contracted hours, and they report that their work life balance has deteriorated. It cannot be claimed from these responses that a positive pro-active outlook is the only difference between the two groups, but it seems to help some individuals.

Some of the respondents in a more senior role spoke again of gaining an additional work load which they found hard to cope with.

*As you get promoted comes more work related activities (working groups, committees, meetings, regional and national commitments) you get involved in which impacts on your home life. It adds to the pile! 20-M-U*

Others (particularly among the non-uniformed staff) report that job insecurity has an over-arching effect on their perception of their work life balance. However, the

responses indicate that this is not solely about work and, for some, a transition or change in their domestic circumstances had an appreciable effect for good or otherwise, e.g.

*Got divorced and have a new partner who is more understanding of pressure experienced at work. (7-M-U)*

*My wife has given up work and is at home, making things better (33-M-U)*

This improvement confirms the view within the life-course literature (Bailyn 2001, Warner et al 2010) that major transitions can have beneficial or detrimental effects, although not necessarily planned that way. Considering the question as to how these older workers deal with their work life balance issues shows the extent of individual difference. There were no clear differences between male and female respondents, nor between uniformed and non-uniformed staff (apart from the immediate concerns of redundancy which was not, at the time of writing, affecting the uniformed staff) and this individuality of experience might go part way to explain why large public sector organisations have found it difficult to address the work life balance needs of their workforce. It would seem that many organisations feel that simply introducing a series of general policies will solve the problem: without realising that ‘one size fits all’ is a fallacy, and developing a more nuanced approach to meeting the needs of specific groups of workers could have a much wider impact on health, well-being and work life balance of the whole workforce.

The next question was in two parts, to ask directly whether work life balance had been affected (positively or adversely) by changes in the pattern of work, or by changes in personal circumstances. These answers highlight the different definitions and

perceptions experienced by individuals. 26 respondents said that neither set of changes had had any effect upon their work life balance, and 49 thought that both sets of changes had affected their work life balance. 15 of the respondents specifically mention the impact of work upon their home life, whereas 21 referred to the impact of personal circumstances upon their work life, such as:

*My children are all grown up now so I can be more flexible with the work life balance (4-M-U)*

Work and increasing work load is clearly an issue for some:

*There seems to be more pressure at work! At home I have to do more for other family members which does not give me sufficient 'me time' (2-M-S)*

Again, this confirms the understanding that home life is part of the equation, and that work life balance is not simply about work. Other respondents used this as an opportunity to reflect upon their work life balance:

*This did happen too for a while. The strange thing is that once work life falls into place you can get the home life on an even keel too. They go hand in hand. I did work first because the personal problems were out of my control at the time but I would imagine if you sorted your priorities at home they would end up sorting those for work life too. (53-M-U)*

This confirms Byron's findings (2005) that work place stress often impacted upon family life, and family conflict had an equal impact upon work, so that each scenario could be said to damage work life balance. This raised an interesting question, as each respondent was very clear about whether or not they had a satisfactory work life balance

and yet they frequently overlooked the work life balance issues of their colleagues and subordinates, and sometimes assumed that, for example, main grade fire-fighters or administrators would have no work life balance problems as they knew exactly what their hours were, and had no management responsibilities. So there was a personal appreciation that the balance was between home and work, yet those in a supervisory position only considered work when looking at their team members. Issues of work life balance were not specifically mentioned during annual appraisal discussions, and many older non-uniformed staff expressed the opinion that their uniformed younger managers and supervisors had no interest in them as individuals. This lack of interest in their wellbeing was confirmed in the annual staff attitude surveys and by some responses from members of Networking Women in the Fire Service.

#### **6.4 Working hours and work life balance**

While the number of hours worked is not an automatic indicator of whether an individual is happy with their work life balance, there are issues of over-long hours over an extended period of time causing tiredness and fatigue which may spill into home life (Skinner et al 2010, Mostert 2011), just as difficulties at home can spill into work life. Providing respondents with the opportunity to reflect upon their actual hours worked gave some the chance to re-assess their priorities, although others felt that long hours were simply expected, and that they had little or no power to change the situation. There are organisational policies allowing for part time and flexible working, as discussed in Chapter 5, although not all staff choose to avail themselves of these, or are allowed to. However there was clearly an aspiration on the part of the Human Relations staff to enable as many people as possible to work within the Working Time Directive despite the opt-out described in the previous chapter. Some respondents commented that they

knew about the well-being and work life balance policies and had applied to work flexibly, but that there was an unofficial quota and they had not been able to change their hours; others had found their managers to be unwilling or simply unhelpful. It could be that there is a general lack of understanding among managers as to how the policies work, and how flexible working patterns do not necessarily mean fewer hours, but simply on a different pattern. Given that there are already several different shift patterns for uniformed and support staff, it seems surprising that additional flexibility could not be accommodated, when this could significantly improve the work life balance for all staff, including older workers.

With regard to the working hours of the respondents, three females worked part time less than 20 hours per week, and two more worked 30 hour weeks, with the remainder of female support staff working 36.5 hours per week, many on a flexi system. Support staff have to clock in and out, and therefore it is easier for them and their managers to keep track of their working hours, and to regularly take time off to reduce the bank of accrued flexi time. One of the previously retired fire officers, who had returned to work in a non-uniformed capacity, reported the benefits to his working life now that he was only required to work the hours on his contract, and his manager would actively encourage him to take off any flexi time that he had accrued.

The participants had already been asked at the start of the questionnaire to specify their working hours and the majority had put their standard working week or shift pattern, for example a 9-day fortnight, or 2-2-4 indicating two days on days, two on nights and four off. So this question was looking at how many hours per week they actually worked, and many respondents indicated a higher number than they had given at the start of the questionnaire. They were then asked whether they ever worked longer than they were

contractually obliged to work. Only a quarter (27) of the respondents said they never work longer than their contracted hours, 84 (74%) said they did work longer, and two said they only worked extra hours sometimes. Of those who never work longer, 8 are female and 20 male, 13 of whom are uniformed main grade firefighters, whose working hours are fixed. As mentioned previously, female staff are more likely to take advantage of flexible or part time working opportunities, and this is generally easier to arrange for non-uniformed personnel.

*If there is work I want to finish before I go home, for whatever reason I will stay on. I always come in early anyway to avoid the traffic and that is one of the benefits of working flexi-time. (39-F-S)*

However, working long hours is not restricted to uniformed staff or to managers: 19 females and 65 males reported they work longer than their contracted hours on a fairly regular basis, although 29 uniformed males stated that they only worked extra hours occasionally. Some responses suggest that working long hours is simply expected by management:

*If you don't work your performance is [deemed to be] poor (105-M-U)*

A further 4 respondents mentioned only working extra hours for specific reasons, such as the start of a project. Half of those who did say they work extra hours(40) said that they did so regularly, weekly, daily or often, however a few support staff (4) reported that they work longer in order to build up their flexi time. 5 respondents said it was their manager who decides if they should work over, 7 said it was a joint decision, and the majority (63) said the decision to work longer was theirs alone. 9 said the decision was motivated by call-outs and incidents towards the end of a shift. Given that 24

respondents identified regularly working extra hours, and 50 said they regularly or frequently worked extra hours, there could be some issues here regarding the perception of longer hours. There is a widely held (but possibly incorrect) belief that UK workers work longer hours than in other countries (Rutherford 2001) and it may be that the WMFS staff simply perceive themselves to work longer hours than they actually do (Roberts 2007). It may be that those staff who feel themselves to be on duty or on call for long periods of time may spend additional time thinking about work, or taking work home with them, or dealing with telephone calls and emails in their own time, and that feeling of 'always working' could easily translate into a perception of putting in an extra 10 or 20 hours per week on a regular basis.

When asked for the main reason for working longer hours there was a marked difference between the responses from uniformed and non-uniformed staff. Those respondents in uniformed roles who do work longer than their contractual hours gave a variety of reasons. Some respondents clearly choose to work longer hours in order to build up TOIL (time off in lieu) or gain overtime payments. Others saw it as a way of demonstrating their conscientious attitude, in order to appear ready for promotion, particularly those who are middle managers wearing their long hours as a badge of honour. There were several respondents (n=13) who felt that they have little or no choice, although they did state that the decision to work longer was theirs. Others saw working longer hours as being the only way they can deal with an erratic or increasing work load.

*The station commander role is very demanding and I want to do a good job. (65-M-U)*



*I often work at home on my laptop – I can concentrate more at home than at work (Open Plan offices) (14-F-S)*

This resonates slightly with Hakim's preference theory (2000) in that some female respondents suggested that they ought to be making choices between whether to further their career by working full time or sacrifice career and spend their time child-rearing and caring. However as the discussion in Chapter 2 also points out, there are several other choices open to women respondents, including taking advantage of flexible or part-time working, or sharing family duties with their partner. In a later question, 20 respondents felt that working longer hours than their contract required demonstrated the commitment to the organisation that would help them to get promotion, although it was clear that most respondents no longer believed that long hours alone would guarantee promotion.

The issues for non-uniformed staff were more around fear of imminent redundancy and wishing to appear to indispensable; they had been told by senior managers that redundancies would only be made among the non-uniformed staff and so, in addition to not being valued, they felt particularly vulnerable and were more likely to work longer hours in order to avoid being chosen for redundancy:

*[I'm] Busy + job situation [is uncertain] (52-F-S)*

When asked whether their current role / rank / position placed them under pressure to put in extra hours at work, around half the respondents (67) did not feel under pressure, although one respondent suggested that extra work just "came with the territory". 5 said they did feel occasional pressure, and the remaining 39 (35%) did feel under pressure to put in extra hours. However, as one respondent put it,

*Yes, but I probably put that pressure on myself [I] rather feel I have / need to stay (89-F-U)*

Again, the reasons for this were subjective and yet those who do not feel under pressure to put in extra hours gave a variety of reasons, including being able to say no at a higher rank, and the existence of flexible working arrangements.

*Commitment cannot be measured in number of hours it is what you do when at work that counts, otherwise I could move a camp bed in and appear to be the most dedicated member of staff in the Brigade. (8-M-S)*

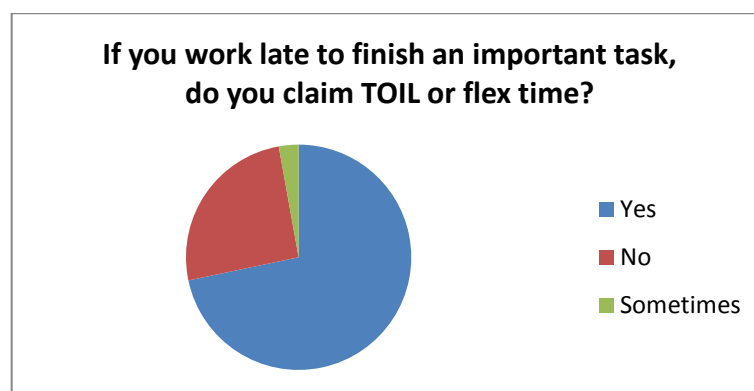
Among the reasons given by those who did feel under pressure were:-

- loyalty to the organisation and to their team
- wanting to finish work off before going home
- wanting to work quietly at home to finish their work
- a belief that there was an organisational expectation
- fear of not being promoted if they worked only their contracted hours
- the increase of emails
- meetings out of hours and on their rota days that they felt obliged to attend.

*Too many requests for new/amended services, poor project management, huge numbers of emails, too much time spent trying to get uniformed customers to accept my advice as a specialist when they think they know better. Endless meetings. (56-F-S)*

Some of the recently retired WMFS suggested that there used to be a very strong expectation that staff would always put the brigade first over family, and promotion often depended on being seen to work excessively long hours. From some of the responses there are still some staff who feel obligated to work longer, but maybe that figure is diminishing. However several of the retired interviewees mentioned the

intrusion into family life that has resulted from mobile phones, PDAs and laptops, so that it was not uncommon to receive phone calls or emails late at night and be expected to have read them and acted upon them by the morning. Current employees seem to be more disciplined than those who had retired about taking time off in lieu and flex leave, with 76 regularly taking TOIL or flex time and only 27 staff members failing to claim their TOIL.



Rota days are those to be taken by uniformed staff who work shifts or on the flexible duty system to ensure that total working hours are within a contractual limit. So if an individual is on cover over a weekend they would normally take the following Monday and Tuesday as their rota days. Nearly a quarter of respondents (26 out of 113) said they didn't manage to take all their annual leave or rota days, citing pressure of work, staffing levels, or inability to take leave that has been accrued.

*Very few times are you really off duty. Work has a pace and a rhythm – you have to be in sync with it to optimise your work/life balance. To be in sync is a stress reduction technique. (75-M-U)*

For this respondent, being in sync seems to mean accepting that work is going to be constant. Many of those who didn't take their full leave allowance were senior officers, who already work long hours, as identified in Chapter 5, and this raises the question of

whether they are setting the right example to their subordinates, as well as whether the quality of their decision making was sufficient to keep them and their colleagues safe (Mostert 2011). The remainder (85) were quite vociferous in their responses that they deserved their holidays; they didn't want to lose their holiday entitlement; they realised the financial value of their time, their family deserved to see them; they were able to utilise their flexible working practices to accommodate peaks in demand; and several mentioned that they needed their leave days to 'recharge their batteries':

*There would have to be an extremely important requirement for me to cancel. This is how I recharge to enable me to complete more work in limited time slots when I'm actually at work. (53-M-U)*

The retired officers who were interviewed agreed that in the past there had been an implicit expectation that they would not take their full holidays and they would work their rota days, although there was some disagreement as to whether this was due to a bullying culture or just an inherent desire to be seen to be working hard. Long hours were often worn as a badge of honour: one reported that it was often said at retirement celebrations that "he gave freely of his time" meaning that "he" worked many extra unpaid hours. This does not accord with earlier research which suggested that older workers were more reluctant to work long hours (Smola & Sutton 2002) and had a less idealised view of work. However many firefighters and non-uniformed staff mentioned that they felt a very strong loyalty to the organisation, and that this was their public duty as well as their job, and so these respondents may not be typical of older workers generally.

At the suggestion of the HR department, respondents were also asked whether good time management helped their work life balance and 94 (83%) agreed that developing

time management skills was helpful. However it was not whole answer, particularly for those in senior roles:

*[Time management] is not really possible with the level of expectations the organisation levels at my role, there is such a large gap, time management will not resolve it, it is a cultural expectation that is endemic in all senior posts. (71-M-U)*

This provides an opportunity for enhancing in-house training programmes to provide a greater understanding of time management tools and techniques, although it is unlikely to solve the problem of increasing the work loads of senior staff, or of those remaining after a round of redundancies.

## **Conclusions**

So what does this show us about the work life balance issues of older workers in the Fire & Rescue Service? Firstly it suggests that the concept of work life balance is one which is important to all older workers, and that they are just as likely to experience difficulties in balancing work and home life as their younger counterparts. It also suggests that while individuals are keenly aware of their own work life balance issues they fail to understand or appreciate the situation of their colleagues and subordinates. For example, the needs of older workers who still have parenting responsibilities or are caring for elderly relatives are simply ignored by their managers who are unaware or disinterested in the home lives of their subordinates. Some are clearly embarrassed about prying into private matters, but should at least ask the question about whether additional work load is impacting their work life balance. This could easily be remedied by basic management training, and could improve performance across the organisation.

Secondly, the organisation appears to be unaware of the actual hours worked by the majority of its staff, as only non-uniformed staff are required to clock in and out. While this could be said to demonstrate trust in its uniformed contingent, and a willingness to permit them make their own decisions as 'self-directed personnel' it has the potential of encouraging a culture of working longer hours which will, in the long term, be self-defeating, as tired staff will not be performing as well as could be expected and tiredness leads to poor decision making.

Thirdly, many older workers find the shift system (particularly the night shifts) affects their health, well-being and the quality of their family life. This is a more intractable problem to solve as there are also many older workers who find that working shifts carries many benefits such as the flexibility to connect with their children's school and spend time with their family. However, given the wide variety of shift patterns worked within this organisation and the possibility of self rostering sometime in the future, it should be possible to find creative solutions to this.

But the very specific nature of the Fire & Rescue Service could be exacerbating the situation for many members of its staff. The strong organisational culture seems to override the good intentions of its well-being and work life balance policies. Lack of parity of esteem between uniformed and non-uniformed staff, however experienced or well-qualified, has clearly had a gradually debilitating effect upon the non-uniformed older workers, and this can only serve to reduce their motivation and commitment to the organisation, thereby reducing the productivity of the organisation as a whole.

A further aspect of organisational culture is the perceived expectation that seniority automatically brings with it additional work load as well as the increases in working hours and time on cover for flexi-duty. While flexi-duty officers receive an additional

20% remuneration to compensate for working/being on call during unsocial hours, the increased responsibility of larger teams, bigger projects, and more meetings clearly makes some roles unattractive for those wishing to retain family life.

The second part of this research was the enquiry into the impact of approaching retirement upon the work life balance issues of these older workers, and this is explored further in the following chapter.

## **Chapter 7**

### **Consideration of Retirement issues**

Having considered how the older workers view their work life balance issues, this chapter adds the aspect of retirement to the mix; to identify whether the approach to, and transition through retirement improves or undermines their perceptions of work life balance. Looking across all of the roles within an organisation from part time support staff to full time senior fire officers provided an opportunity to consider which work life balance issues were having most effect upon both the uniformed or non-uniformed older workers as they approached their retirement, and how they managed those issues. The chapter starts with a consideration about retirement itself and its importance to this research, and then looks at how the respondents planned for their retirement; what impacts their work life balance as they approach and transition through retirement, including the impact of the changes to the Pension Scheme, and finally explores their post retirement work life balance. While it may seem strange to talk of work life balance when someone has stopped undertaking paid work, a wider more holistic definition of work life balance encompasses the relative apportionment of the different aspects of a person's life, and that can include voluntary work, studying, hobbies and social activities and, of course, those aspects of unpaid work that always need attention such as housework, decorating and gardening. Furthermore, as retirement is no longer seen as a 'one-off' occurrence many people move between paid work and retirement several times before they finally cease paid work altogether (Warner et al 2010), and these people may also experience work life balance issues when others expect them to be free of all other responsibilities.



Early life course analysis (Quick and Moen 1998) tended to treat the different life phases as almost fixed in terms of age; so that people left school and started work at a set age, got married, had children, got promoted and later retired at specific ages that were roughly the same for everyone. That simplistic view no longer holds true, as the responses to the questionnaire highlight. This chapter considers firstly how older workers make their plans for retirement, then how they approach the actual event and cope with work life balance challenges, and then what happens after their retirement. The retired interviewees were also asked to look back over their working lives at where work life balance issues had arisen for them, and that provided an opportunity to consider whether things had changed for the current cohort of older workers.

## **7.1 Why look at Retirement?**

Why look at issues of retirement when this research is predominantly about the work life balance issues of older workers? One answer is that there is considerable research that highlights the increased long-term benefits in terms of the health and well-being of individuals who are able to exercise control over the timing and manner of their retirement (e.g. Irving et al 2005, Ginn and Fast 2006, Calvo 2009), so it seemed relevant to question the respondents on how they were making their plans for retirement and to compare this with responses from interviewees who were already retired. A further reason is that while the pensions for uniformed staff are very generous in comparison to other public sector staff, the non-uniformed staff are facing working longer and receiving much smaller pensions and this could have the potential to add to worry and stress to an existing poor work life balance during the last few years of their careers. An additional question arises as to what people actually mean by the term 'retirement'. Many of the respondents still seemed to view retirement as a single step

but, for others, retirement was seen as a gradual process, sometimes involving a change of career or reduction of hours, and could last several years. The timing and approach to retirement has been extensively researched, and one important question has been whether it would benefit individuals to ease gently towards a time when they no longer undertake any remunerative work, or should they work at the same pace until they suddenly stop, and whether a fear of this ‘cliff-edge’ event jumping from paid work into retirement is realistic and detrimental (Vickerstaff 2004, Loretto 2006). Such a fear would certainly increase the tension and possibly damage the work life balance of workers as they approached retirement.

The concept of retirement has changed considerably during the 20-30 years that most of the respondents in this research have been employed in the Fire & Rescue Service, and the notion of moving towards retirement has taken on a different meaning; for some being the start of a new career and for others the end of a working life. Within early analysis of the life course, retirement was often understood as a one-off lifetime event (Hutchison 2010, Lockenhoff 2012) whereby people stopped all paid work and collected their state pension (formerly called the Old Age Pension). Pension funds were not transferrable between employers and schemes, and so the only way to guarantee a good pension was to stay with the same employer for about 40 years. Women retired at 60 (because they were expected to care for elderly parents, and anyway would probably marry someone a few years older than them). Men would retire at 65 and life expectancy was 70: “Three score years and 10”. Very few people worked beyond retirement, although some might take on some voluntary work. Retirement was seen as a rather frightening cliff-edge experience (Vickerstaff 2004), both socially and financially, with most pensions being modest, and most married women being dependent upon their husband’s pension.

More recently there was a swing towards early retirement as the baby boomer generation paid off their mortgages, down-sized and started to take long-haul holidays (Shultz & Wang 2011). Pensions were more generous as the economy boomed; house prices rose steadily and life expectancy had increased. The phenomenon of early retirement began to be seen by many employers as a problem when teachers and doctors wanted to retire at 50 or 55 in order to ‘enjoy life’, but often returned to the workplace in a consultancy role; so from the 1990s the rules on public sector early retirements started to change. At the same time there was a move to equalise men’s and women’s retirement ages. Looking to the future, more and more people expect to work past whatever age they deem to be their retirement (Warner et al 2010) either for interest or for financial reasons. Improved health in the population means that individuals are no longer content to do nothing after finishing work. Life expectancy has increased to such an extent that the pensions system as a whole is in crisis: the state pension age is likely to increase again, meaning that most people will have to work longer, often for a smaller pension.

Respondents were asked about their plans for retirement, and it had been assumed that individuals would be planning in terms not only of financial security, but also their social activities and any future work activity. What was surprising was that, when first asked about their retirement plans, nearly half of the respondents (48%) said they were not making any plans; although when questioned further most of them did have some idea of what they intended to do after they retired. While choosing to plan for retirement can be said to be a deliberate decision, usually reaching a conclusion based on research of the available facts, what decision is made about not making plans? Is this a deliberate decision to not plan? Or is it decision to not think about retirement? It could be simple procrastination, or even a reluctance to think about the future, but failure to plan for

retirement is not confined to the employees of the Fire & Rescue Service and may have more to do with a lack of understanding of what retirement will actually be like (Goodwin & O'Connor 2012).

While some respondents felt that work life balance issues were no different at 45 or 55 than they had been at 25 or 35, many others commented on the additional pressures of having to cope with elderly or ill parents as well as looking after children and grandchildren, and at the same time their workload had increased as they had gained seniority at work. This response was provided to one of the later email questions: *"..had to deal with the death of [a friend] at the same time as looking after two members of the family who were ill, and ensure the rest of the family had a good Christmas!"* (51-M-U). So it would seem that the work life balance issues of older workers can be more complex and more difficult to solve in view of their individual circumstances.

## **7.2 Starting to Plan for Retirement**

The current pension rules encourage uniformed firefighters to retire in their 50s (i.e. after 30 years' employment) and none of their contributions following 30 years' service count toward their pension payments. The new Firefighters Pension Scheme rules mean that this is likely to change over the next few years, with an expectation of a pension entitlement only after 40 years' service. While the majority of uniformed personnel questioned in June-July 2010 were intending to retire in their 50s, non-uniformed personnel employed on the more general local authority contract (see chapter 5) expected to work until their normal retirement age of between 60 and 65, or at the date when their state pension would become payable. (NB the questionnaire was completed

prior to the abolition of the Default Retirement Age in 2011 and therefore the anticipated age of retirement was only to a maximum of 67).

Retirement is generally considered to be one of the major transition events within the life course (Moen 2011, Lockenhoff 2012), and it would seem reasonable therefore to expect that respondents might undertake serious thought and planning as they approached this milestone. Yet the responses to the questionnaire showed that only half of the respondents were giving much thought to planning for their retirement, even when they only had a few years left to work. Some thought they would do nothing or very little following retirement, and others were planning to do some form of work, either voluntary or paid. The lack of planning for retirement is not limited solely to the Fire & Rescue Service, and is very wide spread across the UK (Foster 2011), with many people saying that they are too young to worry about retirement. One reason that people might want to retire and change their lifestyle could be that they wished to experienced less stress in their lives. While many respondents (47%) felt when asked that their work life balance and stress levels were satisfactory, some previously uniformed staff who had decided to “un-retire” (Maestas 2010) reported that they were considerably happier working for the same organisation but in a non-uniformed capacity. Although they claimed that their work while uniformed was not stressful, several then went on to say that the non-uniformed work was less stressful and more enjoyable. Whether the organisational culture discouraged such respondents from admitting that there were work life balance problems while they were in uniform is a moot point.

Those respondents and interviewees who had already retired when questioned said they had carried out varying levels of planning for this event, more so than the plans

exhibited by the majority of those still in employment. For one interviewee the issue had been complicated by the unexpected dis-establishment of their post within the organisation, and so issues of redundancy and early retirement had, for them, been conflated, and they did not have the normal opportunity of a pre-retirement workshop to undertake initial planning for life after the Fire Service. Pre-retirement planning workshops are generally thought to be helpful for employees not normally versed in financial planning (Clark et al 2010) and the Fire Service provides a pre-retirement workshop which tends to centre upon financial planning, such as what to do with the lump sum, whether to pay off the mortgage etc., but does not cover issues such as what to do with their time or how to cope with changes in their social interactions. That pre-retirement workshop is usually offered to staff in the final 12 months prior to their planned retirement date, although the timing was said to be more for the convenience of the financial advisers than for those people who want to attend and, apart from deciding what to do with their pension lump sum, leaves little time for forward planning. This has changed over the past few years; one respondent spoke of the very detailed pre-retirement programme that had been in place and which had proved very helpful in planning for post-retirement life, but that it had been deemed too expensive by the organisation and so had been reduced to the short workshop about pensions.

Some (60%) of the retired interviewees said that they had made extensive plans for their post retirement activity; one had set up a company with a colleague, and another undertook a training course in readiness for a new direction. This planning for a future career appeared to have made the approach to retirement an enjoyable experience, whereas the person whose retirement had been unexpectedly curtailed had found the process shocking and upsetting. However even they found that 'surviving' the process was a strengthening experience, which enabled them to regain their confidence and

resolve, and go on to gain more enjoyable employment elsewhere. This is in line with research (Irving 2005, Ginn and Fast 2006) suggesting that control over the manner and timing of retirement will enhance well-being in the following years, and lack of control or an unexpected retirement can reduce well-being.

### **7.2.1 Planning for retirement (or lack of it!)**

Making plans for retirement is important on a number of levels: for example, financial planning will enable the retiree and their family to live comfortably. The Government encourages financial planning to ensure fewer people are dependent on state benefits. However, planning what to do with one's life after retirement, and controlling how the retirement process happens seems to greatly improve a person's well-being after they retire (Calvo 2009), and therefore the time spent thinking about the future, and planning activities is important. 65 (52%) respondents said they were making some plans for their retirement, but 43 (48%) (including 13 female respondents) said they were not making any plans. Given that women are generally financially worse off than men after their retirement due to lower rates of income and career breaks (Holden & Fontes 2009), this is a worrying statistic. Some "non-planners" offered the explanation that retirement was too far away for them to plan, and a few others did not see the Fire Service as their long term employer and therefore had chosen not to make retirement plans, although it was not clear from the responses why that should preclude the need to plan for their retirement. Of those who felt it was too soon to plan for their retirement were a few who were only one or two years from their planned retirement date, and their determined lack of planning was an unexpected finding in the research as it gave very little time for them to arrange their finances or post retirement activities. For example, one of the retired interviewees mentioned that he had always had a desire to have paid off his

mortgage by the time he retired, but found that he had left it too late, and this may have been an additional incentive for him to continue in some form of paid work.

It was assumed that all respondents, even those who said they were making no plans for their retirement, were paying into one of the pension schemes and therefore the answer 'no plans' might be taken to mean whether they were planning what to do with their time, etc. Their planning did not seem to include the wider lifestyle choices of where and how to live, whether to move abroad, what to do with the additional free time, and the impact upon the rest of the family. A small number (6) of those respondents who were close to retirement, or had just retired, had reported experiencing a sense of anxiety over how they would adapt to being "less important" or cope with a less structured life, or with less contact with people. This anxiety had led one or two uniformed respondents to "un-retire" and return to the organisation in a non-uniformed role, and others to consider alternative careers, and this had generally been a good move.

*"I have retired from the operational side and am employed [in a non-uniformed role]. The pressure to perform for promotion has gone. The strain of operational duty and shift work has also gone. I am happier in my work due to the control I have over my job and workload. Flexible working hours is greatest benefit in my work/life balance. I am financially secure and socially better off, enjoying my day to day work." (33-M-U)*

This response shows the stark contrast between the pressure of the pre-retirement role and the relief of the post-retirement role and this pressure could certainly be seriously considered by the HR and Occupational Health departments when formulating policies for older workers.



Irving (2005) suggests that most people's retirement planning is centred upon whether they feel they have made sufficient pension contributions, and clearly money worries or the lack of them will impact the well-being and work life balance of older workers. The current Fire Service Pension permits greater contributions from both employer (24.4% of pensionable pay) and employees (11% of gross salary), and has a much more generous final lump sum payment than most other public sector workers, such as Police, NHS and teachers, so it could be seen as reasonable that the respondents only concentrated on pension contributions when answering the question "are you planning for retirement?". On the other hand Calvo (2009) and Yeandle (2006) suggest that planning and control over the actual process of retirement will improve health and well-being after retirement, and therefore more thought should be given to this crucial transition within the life course. Government policy is supported by considerable research (Ginn 2003, Budworth 2009, Foster 2011) to highlight concern at the lack of even the most basic financial planning in the general population, and this target group appear to demonstrate this. The Cornell Retirement and Well-Being Study (Moen 2000) found that many retired people regretted not having done enough planning for their retirement; it also found that women left retirement planning slightly later than men. The answers given to the current research questions tend to accord with the earlier American study (Moen 2000), which may have valuable lessons to offer to UK public service employees thinking about their retirement. For older workers in the fire service approaching retirement there seems still to be a reluctance to start planning in a timely fashion, even when respondents know that they should have started their planning earlier. Given the general reluctance to carry out forward planning, this could be an area of work for HR personnel who are tasked with employee well-being, and this could

create longer term benefits for this target group. Planning also includes estimating when an individual intends to retire, either at a specific age or at a specific event.

The words and phrases used by the respondents when discussing their imminent or planned retirement was instructive; some used phrases and metaphors indicating fear and anxiety over an unknown future:

*I don't know yet what changes are going to take place but I'm filled with foreboding (98-M-U)*

*My intention now is to try to get my hours reduced so I can ease into retirement. This decision has come about because of the realisation that not working at all will be a traumatic change to my life which I don't particularly welcome. (ok, scared to death that I will have nothing to do and no reason to get out of bed in the morning) This really is nothing to do with money. (74-M-S)*

and others were looking forward to freedom and new challenges (Sargent et al 2011),

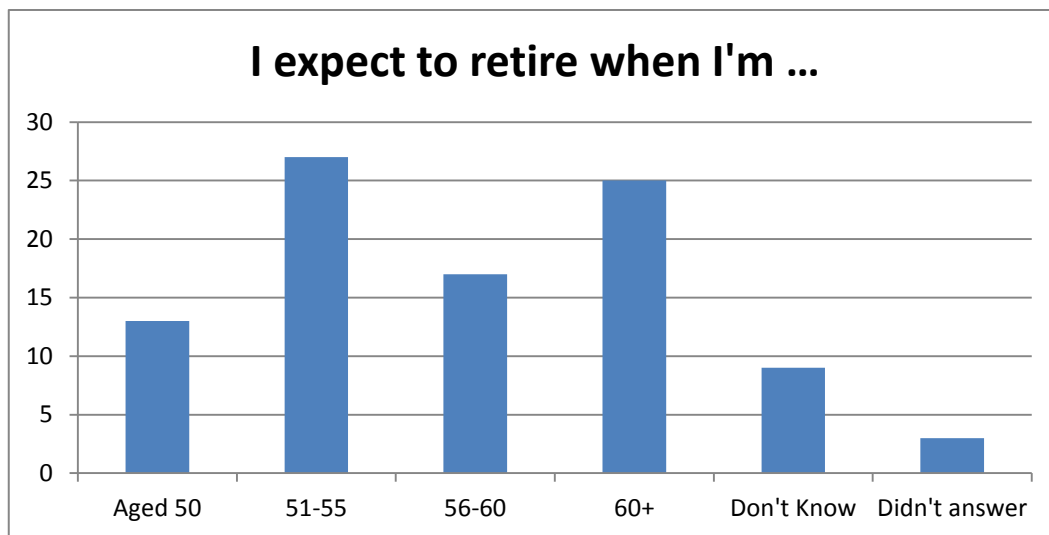
*Looking forward to retirement now, 30 years is long enough, feel sorry for those who will have to go to 65, their bodies need to be tough, all the older firefighters I know carry some reminders.....Would like to travel more, we'll see (9-M-U)*

even if the reality was that they would not be able to afford to live in the way they hoped (Goodwin & O'Connor 2012).

### **7.2.2 Expected age of retirement**

This research was conducted prior to the abolition of the Default Retirement Age in April 2011 and, at that time, the general expectation was that uniformed personnel

would retire following 30 years' employment, and non-uniformed personnel would retire at State Pension Age of 60 – 65. A few respondents (7) felt that they would leave WMFS before retirement age, and retire from some other employer in the future, so did not indicate when they planned to retire, but the rest were quite specific.



Some of the uniformed respondents had identified the exact future date when they expected to retire, or indicated how many months, weeks and even days they still had to work. This suggests that some respondents were anxious to leave but would not formally retire until their official date in order to secure the maximum pension. This view reflected many of the responses in the Department of Communities & Local Government report on Working in the Fire Service (2008), where many individuals stated that they were no longer happy with their employer but felt that they did not wish to jeopardise their pension arrangements, or felt that they could 'last out' until their retirement date. Within West Midlands Fire Service it appeared that many uniformed staff were no longer as committed as they had been, but were ready to leave as soon as they could:

*“The feeling of working for a family of colleagues is diminishing, youngsters appear selfish. Looking forward to retirement now, 30 years is long enough, feel sorry for those who will have to go to 65, their bodies need to be tough, all the older firefighters I know carry some reminders. Had a good time on the whole, but have been fortunate in timing. How will the Fire Service keep staff in future when the pension is not holding them? It may not be a career for life in future.”*

*(9-M-U)*

This response suggests that there is an expectation that knowing one is to retire prior to 65 takes some pressure off, and that work life balance may therefore be improved, whereas those who may have to work at hard physical jobs until 65 or later may suffer a diminished work life balance.

However for non-uniformed staff, their plans about when to retire (and their work life balance) were affected by the very real fear of redundancy, and they felt that any job was better than no job and no income. At the time of the questionnaire, non-uniformed staff had been informed that a number of them would be selected for redundancy in order to meet the new financial constraints imposed by public sector funding cuts starting in 2010, and this had led many to feel that their work and their loyalty meant little to senior managers. This fear of redundancy was what had prompted several non-uniformed respondents to start working extra unpaid hours, to try to appear more efficient and indispensable. Among this group there was also a note of resentment, particularly from older female respondents, that their original planned retirement date had moved from 60 to nearer 65, and possibly increasing to 67. Some of the comments of older female respondents suggested that the additional years spent in a job where they felt they were no longer appreciated or valued would be hard to take. For example:

*I work part time and I am nearing retirement, I am not seen as a valuable member of the team. I am often not given first-hand information about the job I do. Younger workers are selected for tasks by members of the opposite sex because of their looks. (99-F-S)*

Research by Davey & Davies (2006), Armstrong-Stassen & Lee (2009) and Skakon et al (2010), as discussed in the literature review, suggests that consistently poor management of older workers is likely to reduce feelings of well-being and perceptions of good work life balance and this may affect the respondents' decision on retirement age. This overt lack of consideration or respect for the non-uniformed older workers in the organisation is likely to lead to reduced motivation and that can result in a reduction in productivity across the organisation.

There are of course many other influences on the planned and actual age of retirement including whether the respondents had any caring responsibilities: for example those looking after elderly parents were clearer about wishing to retire early, whereas those with young children, often from second families, intended to work longer for mainly financial reasons. Also those working women whose husbands retire before the woman reaches state pension age may be influenced to retire early (Vickerstaff et al 2004, Loretto & Vickerstaff 2012). Here again, life-course analysis would suggest that a person's current decision making is largely influenced by a combination of their current circumstances and their previous experience, but those with parenting or other caring responsibilities are less likely to retire early (Hutchison 2010, Moen 2011).

Once the effects of the abolition of the Default Retirement Age feed into the organisation and more employees decide, for whatever reason, to continue working, then the organisation will have to make provision for a much larger cohort of older

uniformed staff; for example, are they still fit enough to undertake the full range of operational duties? If not, will they be allocated less physical roles, which in turn could impact the overall competence of other firefighters? Are there enough semi-operational roles for the older workers; for example full fitness is probably not required if the task is to go into schools and community groups to talk about fire safety, or to fit smoke alarms. A distinct advantage of having more older operational staff is that vital skills, knowledge and experience can be retained within the organisation, and older workers can mentor and guide younger members of staff on a more structured basis than currently obtains.

Whatever decision is made about when to retire, the other side of the coin is how that retirement is approached, and whether the respondents were planning to reduce their hours of workload as they approached their retirement date.

### 7.3 Approaching retirement

The respondents were asked to indicate how they were planning to retire, to explore whether they were exercising any control over the manner of their retirement and whether their planning or lack of it was having an impact upon their work life balance or general well-being. Over 20 respondents answered Not Sure to each of the suggested approaches, which indicates that this could be an area of their life that has not been considered. Indeed this could be the first time anyone had asked them about their plans, and so Not Sure would be a reasonable answer.

In answer to the question “do you plan to retire by....” They responded as follows.

		Yes	No	Not sure
A.	ease into retirement by gradually reducing your hours?	10	68	28

B.	continue working the same hours but doing lighter work?	3	78	23
C.	continue working the same hours and same job until the day you retire	65	20	22
D.	continue the same work intensity but in a different job role?	19	56	31

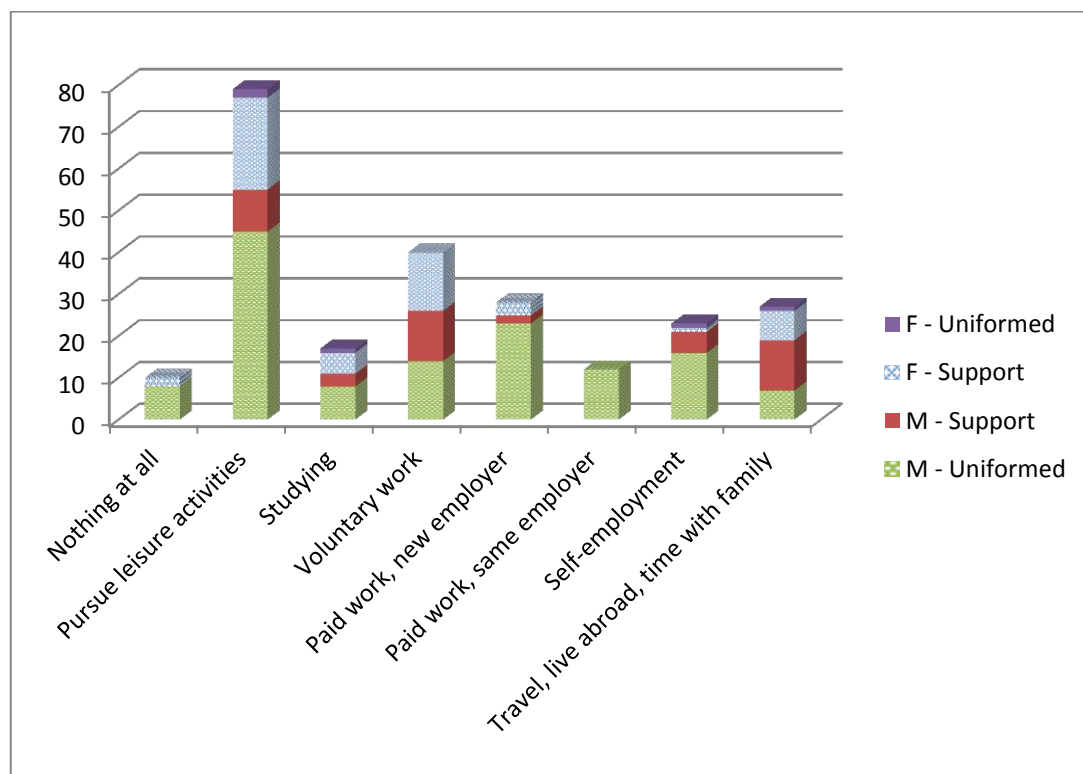
The majority of respondents intended to continue working in the same job and the same hours until they retired, which is described by Vickerstaff et al (2004) as ‘cliff-edge’ retirement, although a few were considering reducing hours to ease into retirement. Vickerstaff et al (2004) had suggested that the opportunity to ease into gradual retirement could benefit older workers, particularly those who feared the ‘cliff-edge’ between work and retirement. The cliff-edge is also a metaphor for the sudden reduction in pay as well as for reduction in workload and social contact, and could be a very difficult transition for some. Conventional wisdom also seems to suggest that easing into retirement by dropping a few hours or a day a week would be beneficial in helping individuals to prepare gradually for their extra time in retirement. However Calvo (2009) noted that wellbeing after retirement was not necessarily improved by easing gently into retirement, and unexpectedly improved by working normally until the day of retirement; and this is clearly what the majority of uniformed respondents intended to do. None of the already retired respondents had slowed down or reduced their hours prior to retirement, and none had even considered doing so, although this could reflect the lack of organisational policy in this area. Working full time up until the final day of retirement may also be required by an individual’s pension rules, as final salary pensions would be reduced if the final salary was cut through a reduction in hours.

Policy developments to permit gradual retirement without the sanction of losing pension income had been based largely on the previous Labour Government’s aspiration to increase labour market participation of older workers (Vickerstaff 2008). However this

co-incided with the start of a major crisis in the financial sector, which left insurance firms and pension funds unable to meet those aspirations without increasing the rates of contributions and extending working lives beyond the state pension age. These changes were just coming into effect, much to the alarm of some of the research respondents.

The respondents had already been asked the question regarding planning for retirement, and an additional question enabled them to delve deeper into what plans, if any, were being made. Again considering the improved well-being that exists for individuals who have been able to plan and control their retirement (Calvo 2009, Vickerstaff 2004), it was important to find out whether the older workers in the Fire Service were making plans for what to do after they had retired.

#### **What I intend to do after retirement from WMFS...**





Despite 43 people answering an earlier question that they were not making any plans for retirement, only 10 individuals thought they would do nothing at all. The vast majority of responses (103) showed an intention to undertake some form of work, either paid or unpaid. This was further explored in the interviews with retired personnel, who displayed a wide range of responses to whether paid work for retired people was appropriate; one respondent felt it quite unfair to take a paid job when their pension was more than enough to live on, whereas some others had always planned to follow a new career path. One had returned to a part time non-uniformed role and although they did not plan to work for much longer, they were happy with their choice (M-116-R) and enjoyed the reduction in responsibility while remaining in the fire service. The answers would certainly support the suggestion that having control over retirement and plans for what to do after retirement are very beneficial, not only post retirement but pre-retirement, in providing some certainty for what will happen after the retirement day. It also suggests that doing something, even in a voluntary capacity, after retirement enhances wellbeing.

### **7.3.1 The impact of planned changes in pensions arrangements on retirement decisions**

23 respondents (20%) reported that the planned changes to firefighters' pensions would influence their decision about their retirement date, whereas 41 said No, and 39 said they were Not Sure.

*Threats to make late shift payments non pensionable, failure of the brigade to support staff (station officers) on protected pay. The crazy situation [is that] the old pension scheme does not offer any incentive to stay at work once you have paid your maximum benefits – (it must be economical to do so). All these are key*

*factors in reaching the sad decision that although it must be in the national interest for staff to work longer and make financial sense from a gov't viewpoint – there is no incentive / I would be penalised for working longer (35-M-U)*

This response clearly identifies the current situation. Future changes to the Firefighters' Pension Scheme include working up to 10 more years and paying the existing level of employee contributions to ensure receipt of a similar pension, although these changes will only affect new entrants to the Fire & Rescue Service since 2006. Those within 10 years of retirement are not affected, so these planned changes are unlikely to directly impact upon this research sample, however there have been large scale public protests against the proposed cuts in public sector pensions (Fraser 2011) and this had contributed to 39 respondents being very unsure. Public Sector pension changes for the non-uniformed staff expecting to retire on local authority pensions are likely to happen at a faster rate than for the uniformed staff, leaving little time to make alternative arrangements regarding the anticipated shortfall. However there were also 7 responses and comments to the effect that the respondents were unaware of the details of any proposed changes, despite coverage in the media and pronouncements by the unions, and this again ties in with the lack of planning for retirement. Considering this from a life course perspective (Hutchison 2010), it could be suggested that many firefighters have simply drifted through their careers and expected "everything to be alright" or even better when they retired even though they had little real idea of what retirement would hold for them (Goodwin & O'Connor 2012). This optimistic attitude is also reflected in their general attitudes to risk and other events, in that they simply don't expect anything bad to happen to them (Reason 2008). Whether this is unrealistic optimism or wilful blindness (Heffernan 2011) was not clear from the data, but does tie in to the question in the earlier chapter about why people chose the fire service as a

career, in that possible future issues of work life balance had not deterred them from applying to the fire service.

If working over long hours (which many of the respondents say they do), poor job resources such as disinterested management, and a lack of engagement with work may be detrimental to the work-family interface and wellbeing (Shaufeli et al 2008, Mostert 2011), then it becomes important to consider the work life balance of the respondents as they start to think about approaching retirement.

#### **7.4 Work life balance and wellbeing while approaching retirement**

Some older workers in some parts of the organisation experienced a satisfactory work life balance as they approached their retirement:

*I think generally those around me have a reasonable work life balance. None of us are expected to work more than 36.5 hours and there is no requirement to take work home with us. A flexible approach to workloads is taken in my office, if anyone needs time out for family reasons there is not usually a problem with sorting it out. (42-F-S)*

Others felt that, even though their work life balance may not be satisfactory any more, they intended to retire in the next year or so, and so they would hang on until they retired.

*At the moment I have paid a large part of my earning money into a scheme to retire from fire service work at 54yrs of age. I can go at 50 (later this year) with a vastly reduced pension. I will review the home work balance over the coming four years. (53-M-U)*

This course of action could place a great deal of strain on the health and wellbeing of the respondents, as well as raising possibly unrealistic expectations of what retirement would be like. Approaching a major transition in a state of physical or mental exhaustion would be unlikely to guarantee high levels of well-being after retirement. The recently retired interviewees had also been asked to look back at their careers to identify when their work life balance issues had arisen. Some had never managed to attain a good balance: working as non-uniformed support meant, for some, that there was an expectation that one would be available on the phone or over email outside working hours despite there being no financial recompense. Uniformed officers received an additional 20% enhancement to their salary for flexi-duty work, which brought their average working and on-call hours up to 78 per week, but even so their workload had increased substantially.

Many of the uniformed respondents intending to retire in the next few years had reached a senior level within the organisation, and felt that they were respected and their opinions and knowledge was sought by their younger colleagues. This was articulated by the retired uniformed interviewees who all claimed that they had been treated with respect during their final years. This was contrary to US research (Frankel and Picascia 2008) suggesting that older workers are barely tolerated and often disrespected in their final few years, being generally perceived as cruising to retirement and blocking the progress of their younger co-workers. Some respondents referred to a positive desire by younger colleagues to learn what they could from them before they retired. While some organisations undertake this sort of knowledge transfer in a formal systematic way, the Fire Service had no such arrangements, and this was done on a purely ad hoc basis. From the responses it seemed clear that the fact that younger workers were seeking their opinion greatly added to the enjoyment of their final years.

Some of the non-uniformed staff expressed a very different experience, and many reported feeling under-valued and over-looked for interesting work, and this had contributed to their perceptions about their own work life balance and their decisions on when to retire. This was particularly the case for non-uniformed female respondents. One respondent mentioned the esteem in which she had been held as a divisional administrator had completely disappeared when a few years later she had moved to a less high profile role, and reported being ignored by the same (uniformed) people who had once sought her advice and opinion. Another mentioned her resentment that younger and supposedly more attractive colleagues were given the more interesting jobs to do, and she had been virtually forgotten when it came to giving out assignments. Another non-uniformed respondent spoke of a culture of bullying and disrespect for older workers that had been very 'effective in removing the old guard' from the organisation. This is not an organisation that appears to have committed to 're-engage, retrain and re-ignite' older workers (Leibold & Voelpel, 2007) and many of the manager respondents showed a lack of understanding or care for the work life balance and well-being of the older members of their team. Despite the recent age discrimination legislation it would appear that this is not always followed to the letter by the management of this organisation. Some respondents who were in management positions seemed unaware that any older members of their team might be suffering from poor work life balance due to family pressures.

*Managers all have work life balance issues, but the main grade fire-fighters are okay. They just work their hours and they have nothing to worry about. (1-F-U-NWFS)*

Others understood that some work life balance issues might arise, but appeared to be unconcerned about this;

*Station based personnel seem to be ok as they do set hours, other than the impact of shift work. Support staff seem to be somewhere in-between. Whilst under set hours they are stressed thus affecting them at home, others seem to be coping, the nature of each job is key. Everyone seems to be aware of the potential cuts, so I guess they take that fear home. (34-M-U)*

This suggests that the term ‘work life balance’ is only understood by managers to incorporate stress at work, and doesn’t include what might be happening in the rest of a person’s life. It was certainly not included in the annual appraisal interviews. Poor management of older workers can often lead to low motivation and dis-engagement (Armstrong-Stassen and Lee 2009), which in turn can reduce productivity, and so this lack of respect is something that could be addressed by management training within the organisation. However, it was always open to the individuals themselves to take proactive action. Within the public sector generally there is often a culture of passive acceptance of the status quo, or a learned helplessness (Dweck 1975, 1999, 2002; Dweck & Molden, 2005), that seems to discourage individuals from volunteering for more interesting projects or taking more control over their work life balance and their own career outcomes, and this again is a situation that could be addressed by any one of a variety of HR or Training initiatives. If staff members are expecting to work for more years, it would benefit employers to make the most of the skills and expertise of those workers by ensuring they remained motivated and productive.

Interviews with retired personnel involved an invitation to look back at their working life and their entry into the fire service, considering when and how issues of work life

balance arose and how they dealt with it, and how they had planned for, approached and transitioned through their retirement. For some, work life balance issues arose early in their careers, for example when children were born, and family activities had to be fitted in to the work schedule. For others, it was the promotion to middle management that saw the start of work life balance problems, dealing with the management's expectation that work load and working hours would increase, and that the needs of the job came first. Some of the non-uniformed staff had reported experiencing challenging work life balance issues as they gained more responsibilities, and some reported that there was an expectation that they should keep their mobile phones switched on even when they were not at work, in order to deal with queries from uniformed staff who were working unsociable hours. While that would be an individual's choice, it can sometimes be difficult to resist the subtle pressure from managers and team members.

One retired respondent reported that work life balance issues had always been there, but that they had increased with the level of responsibility; it had seemed to him that additional duties would be expected, so that each new job was automatically more stressful and time consuming. Usually the additional problems would arise over 'people issues', trying to introduce unpopular policies, or discipline members of staff. Two of the retired interviewees and four serving managers mentioned that they had received little support from HR or senior managers when people issues had occurred, and the stress had arisen from feeling that managers had to deal with these issues on their own.

When the retired interviewees had started their careers in the fire service they were required to attend several long term residential training courses at Moreton-in-Marsh (the location of the Fire Service College) and these had sometimes caused problems for firefighters with young families. Shift working, while enjoyed by some, was said by

others to be a major contributor to work life balance issues; sometimes that being the change from one shift pattern to another, for example moving from shifts to a Monday-Friday 9-5 and having to make arrangements for visits to the doctor or school by taking leave. Additional problems arose when both husband and wife were working shifts; if the shift pattern changed they could find it difficult to co-incide, or to make child care arrangements. This was reported by several respondents, regardless of whether their partner worked within the fire service or for another employer. On the other hand, several others reported that shift working was beneficial to them and to their families, and that long or irregular working hours were not a problem to them.

The Cornell Retirement and Well-Being Study (Moen 2000) found that nearly half of their study would have liked to reduce their hours of work prior to retirement, but could not due to increased work demands and job expectations. A further 25% had needed to continue to work the same hours as they needed the money. While this research questionnaire did not ask the question about desiring to reduce hours overall, it did note that those respondents who regularly worked longer hours than they were contractually obliged, often did so to deal with increased workloads. Many said that it was an expectation of the organisation, particularly for those in management roles, to work longer hours.

Wondering whether those currently in employment with the fire service had different views about their working lives to those who were already retired had prompted the interviews with a number of retired personnel. Had working lives been harder in the past, or were they easier than for today's employees? However, the retirees looking back at their work life balance issues tended to report that the same issues had occurred at similar times or stages as for those still working: family pressures, increasing work



load and poor management all added to the burden, whereas flexible working patterns, supportive managers and well planned work schedules all helped.

In the Fire and Rescue Service it is still the case that uniformed fire-fighters retire generally in their 50s whereas the non-uniformed staff work until their normal retirement ages of 60-65. Out of a workforce of 2500, only 450 are aged 45 and over, whereas other public sector organisations have a much larger cohort of older workers. It may be that the relatively small number of older workers is one reason why most of the organisational policies (discussed in Chapter 5) appear to benefit younger and mid-life workers, and comparatively little notice is taken of the additional issues facing those approaching retirement either by individual managers or by the organisation itself.

These responses seem to indicate that there are specific work life balance issues facing older workers as they approach their retirement and that while some older workers are making detailed plans for what happens after they retire there are others who do not undertake a planning process. So, which group, the planners or non-planners, are more likely to enjoy well-being in their retirement?

## **7.5 After retirement**

Looking back from the perspective of post-retirement, the interviewees had, with one exception, attended pre-retirement courses, and had planned to the exact day when they would leave. Part of their retirement process had been the planning for their leaving / retirement celebration, which included choice of location, who to invite to say a few words, whether it was an open event, all these had been enjoyed by the interviewees. One interviewee stated that his retirement and his 50<sup>th</sup> birthday had happened in the same month, and there had been an almost continuous round of parties and get-togethers, so that it was a few months later before he felt 'properly retired' and was now

working in a new business venture with a friend. This raises an interesting question from the life course perspective as to what ‘proper retirement’ is all about; for this person it was clearly not the total cessation of paid work, but more the ending of a chapter in his life, and the start of another. The definition of ‘retirement’ has changed frequently over the past few years (McNamara et al 2011) and now includes many people who are claiming their state pension but are still employed or may not even describe themselves as retired. Most of the interviewees felt that they had been ready for retirement, however defined. The reasons varied from simply wanting a change of work patterns to leaving a job with too many responsibilities. Some left intending to do no further paid work at all, and others felt that they needed to feel useful whether to the same employer or to another. Several retired respondents had very quickly returned to work for the Fire Service in a non-uniformed capacity and were thoroughly enjoying their new positions, reporting that they particularly noticed reduced stress, more manageable hours, less responsibility. This would suggest that, prior to retirement they had experienced stress, long working hours and considerable responsibility, although they said that their work life balance had been under control. This could be due to the fact that the fire service is a male-dominated and somewhat militaristic organisation, where admitting stress can limit career progression. Non-uniformed line managers kept records of working hours, and discouraged staff from accruing toil, thereby ensuring that they did not work excessive hours. The benefits to these ‘un-retired’ workers included the re-affirmation of status, for example:

*“I’d gone from being an important person in the British Fire Service to being somebody who was fighting over wheelie bins. I remember sitting there thinking, “Oh you’ve got to get a life” ... The first thing people ask you when you bump into them - “What are you doing now?”. At first it’s great going,*

*“Nothing at all, absolutely nothing”. Then you think, “God no I’m 50 ...”. I was 51 then.” (115-M-R)*

Clearly it was easier for retired people to say “I am...” rather than “I used to be ...” in answer to the question, “What do you do?” The anticipated loss of status was also mentioned by a number of the respondents who were planning to retire in the near future: particularly by those who had made no plans for their post-retirement life.

One retired respondent had been planning for some time prior to his retirement that he would take up a completely different career path, and had enrolled on a course in readiness. He reported being thrilled to obtain part time employment in his chosen field where he could work with minimal responsibility, regular hours, doing a job that he enjoyed. He reported that he had found his final few years in the Fire Service to be very stressful through constantly increasing workload and poor management. For him, work life balance issues had occurred as he gained promotions and his seniority increased. Only one interviewee said he was steadfastly not looking for paid work, believing that it was not a moral choice for him to take a job when he had plenty of money from his pension, and did not want to deprive someone else of a chance of work. He was undertaking some voluntary work, and was involved in other local groups, but had no desire or need to seek paid work.

Does this group reflect the experiences of larger studies? Early life course analysis of retirement issues (Quick & Moen 1998) suggested that in general men report slightly greater retirement satisfaction than women, which is reflected in the interview sample. For women, their increased quality of life in retirement was closely associated with having good health, a continuous full time career, an early retirement (though not earlier than anticipated), and a reasonable income post-retirement. For men, good retirement

quality required good health, having had an enjoyable pre-retirement job, substantial pre-retirement planning, and retiring for internally motivated reasons (e.g., to do other things). Both men and women reported that good personal relationships were important, although sometimes retirement itself could place a strain upon marriages. This could be the case for the retired interviewees, but as they were interviewed within 18 months of their retirement, it is probably too soon to say.

## **Conclusions**

What can be surmised about preparing for retirement from a relatively small sample?

And do work life balance issues facing older workers as they start to consider their retirement affect their decisions? Some of the responses suggest that retirement was seen more as a means of escape from stressful workloads and poor management rather than a planned next phase of life which may or may not include remunerated work.

Those who are simply hanging on to get their pension are likely to be less motivated and this will reduce their work life balance and well-being, sometimes even to the point of precipitating illness. The implications for the employer are clear: as a greater number of older workers remain in the workplace, following the changes in the pension schemes and the abolition of the Default Retirement Age, those older workers will form a larger proportion of the workforce and any lack of motivation or productivity will impact upon the effectiveness of the organisation. Training and support could easily solve some of these dilemmas and it is a perfect opportunity for the organisation to be pro-active to ensure its older workforce remains productive.

When individuals reach this point in their life course their reactions and their decisions are often based upon their experiences during the earlier part of their lives (Moen 2011) but it was not evident from this research whether a choice regarding whether or not to

plan for retirement was a deliberate decision based on either circumstances or experience. Clearly there are issues to be resolved about the failure to plan for retirement, but this is much wider than just West Midlands Fire Service, or probably the public sector as a whole; individuals seem to display a lack of willingness to plan. Fortunately, compulsory inclusion in the various pension schemes will ensure that older workers do have an income following their retirement, and perhaps that is the best result that can be achieved.

For most, 50 is simply too young to retire and do nothing, even if individuals are generously compensated by the pension, and most seemed to want to continue working in some capacity (whether paid or voluntary) but not in the same role, with the same responsibilities, as before. The sudden lack of status, activity and social interaction, encouraged some of the uniformed staff to un-retire (Maestas 2010) and the additional benefit to them was that the stress, long hours and workload were now much more manageable. However, a further possible reason for un-retiring could be more to do with self-image, and how a person wishes to describe themselves, i.e. a retired firefighter or a non-uniformed employee (McNamara 2011). For the non-uniformed older workers, who are expecting to stay in employment until they receive their state pension, the work life balance issues have a greater impact, the support from their managers seems less, and a resultant lack of motivation was mentioned on several occasions.

## **Chapter 8**

### **Conclusions and Recommendations**

The research set out to explore the work life balance issues of older workers in the Fire & Rescue Service as they approached and transitioned through retirement. As stated in the introduction, this gave rise a number of additional questions:

“do older workers have any work life balance issues at all? And if so, are those issues specific to their age cohort or are they more generally encountered by all age groups? If older workers are dealing with work life balance issues, does the approach and transition through retirement (and for some un-retirement or re-employment) have an impact? Does planning for retirement, and having some control over the manner of retirement, improve work life balance in the final few years of employment? And does the organisational culture of the Fire & Rescue Service affect the work life balance of its older workers?”

The secondary research question related to the extent to which government and organisational policies for well-being and work life balance had impacted on older workers. The research was carried out within the theoretical framework of life-course analysis, the five main elements of which are that (a) there is continuity as well as change; that (b) the age of a person may be measured as a biological, psychological, social or spiritual age; that (c) people interpret the wider world through the lens of their family life; that (d) there is often a link between experiences as a child and those in later life; and that (e) people can make choices and construct their own life journey by reacting to the opportunities and constraints that face them (Hutchison 2010). In some areas of the research the life course perspective has been most useful, for example in

contextualising the experience of older workers at the hands of their younger colleagues and managers, and in understanding the elements of continuity and change for individuals in a 30 year career pattern. However other elements were not so helpful, such as whether the decisions made as young people had impacted upon the career choice of fire-fighters. And the final key element, that of making choices according to the circumstances facing the individual at a specific time seemed to be simply stating the obvious. However, it was on the whole a useful way of interpreting the individual perceptions of work life balance of this cohort of older workers.

It is a perfectly reasonable question to ask why employers should worry about work life balance issues in a time of public sector spending cuts. And yet dealing with the additional pressures placed on employees at such a time is exactly why work life balance issues, particularly for older workers, can become a problem. The real issue in the public sector should be about getting the important work done and stopping doing the unnecessary work if employers no longer have the staff available to do everything. While it is a fact that work life balance policies in Europe have developed as a means to increase labour market participation across the EU, particularly by increasing female labour in the workforce, there is also a very strong business case for encouraging good work life balance, and it was suggested by the Chartered Institute for Personnel and Development that the many business benefits, such as improved employee engagement and higher productivity, would far outweigh any increased management costs (CIPD 2009)

The choice of the Fire & Rescue Service for this research was rewarding in that it provided opportunities for comparisons of different groups of workers, and also showed how similar the experiences of some of the groups could be, for example that both men

and women had fairly similar views on some questions. With thanks to the generous assistance of the HR department of West Midlands Fire Service, all staff aged 45 and over received a questionnaire regarding their work life balance, which gained around a 25% response, and included staff in almost all job roles in the organisation. The age of 45 was considered appropriate in order to capture the responses from those in the final few years of their working lives, as uniformed firefighters used to retire after 30 years' service while in their 50s. Questioning both uniformed and non-uniformed staff from across the whole organisation provided a much broader view and possibly more reliable results than selecting, for example, one or two departments or all members of a particular level in the organisation such as middle managers (Chang et al 2010).

### **8.1 The Fire & Rescue Service**

The first aspect of the research was to consider whether work life balance was the right term to describe the division between paid work for West Midlands Fire Service and all of the other activities outside that paid work. As set out in the literature review and methodology, it was finally decided that it was the most appropriate phrase as it was the most widely recognised by the respondents, even though what individuals meant by the phrase work life balance seemed to differ widely as the examples in Chapter 6 show.

The phrases and metaphors that individual respondents used to describe both work life balance and their approach to retirement provided an important insight into how they perceived their own specific situations, and therefore every attempt was made to work with their personal metaphors, rather than impose any interpretations from the researcher (Sullivan & Rees 2008). This was particularly relevant when returning to respondents, checking their responses in monthly emails and in conducting the face to face interviews.



One of the major difficulties encountered in exploring personal experiences of work life balance through the lens of life-course analysis is that it is a very subjective concept: one person may experience time spent at work as interfering with their family life (often referred to as work-family conflict), and another experiences work and home life as a complementary blend where each aspect will enhance the other (referred to as a work-life blend). Some respondents felt that the employer should take sole responsibility for their work life balance, particularly when expecting them to work additional hours, whereas others felt it was entirely their own responsibility, and yet others placed themselves at different places along that continuum. How then should an employer respond? This employer had created a number of excellent policies to improve wellbeing and work life balance, although they were somewhat general in nature and failed to take account of the very specific needs of its older workforce. In addition, the organisational culture was so strong that these policies were often observed in name only and so, for example, it was much more difficult for uniformed staff to avail themselves of the flexible working policy as there was an impression among some managers that it was mainly for the non-uniformed (female) staff. It must be remembered that this was a highly competitive, male-dominated, militaristic culture where progress to senior roles often depended on which manager belonged to which clique and who was prepared to act as sponsor; in such an organisation it is hardly surprising that there was little readiness among the staff to avail themselves of work life balance or flexible working policies that might indicate an inability to cope with the pressure.

The role of the organisation and its managers is crucial in the individual's perception of their work life balance; a lack of understanding or empathy for the needs of the individuals in a team can destroy the working relationships within the team as well as

damaging the remaining career of an older worker (Kelloway & Barling 2010). There is an assumption in some organisations that older workers are blocking the progress of younger staff and that they spend the last few years of work just cruising to retirement. This assumption needs to be challenged, not least because the abolition of the Default Retirement Age means that workers will be able to continue working beyond their expected retirement date and so their skills and experience have the potential to be a valuable resource for the organisation.

Several older workers commented on the lack of empathy and understanding shown to them by their managers and supervisors: although part of this could be due to a general reluctance to interfere in the private lives of team members, not wishing to intrude, or to appear nosey. This could easily be dealt with by including issues of work life balance in the annual staff appraisal interview; for example if the person is considering a new training course or promotion the manager should be able to ask how that would impact on their work life balance. Any squeamishness by the manager would be reduced if a mandatory question about work life balance was routinely included in the process. Given the changes required by the abolition of the Default Retirement Age, this would be a good time to re-visit the annual appraisal questions.

The research found a large number of managers who believed that they were the only ones who have any work life balance issues and that administrators and main grade firefighters, who worked regular hours, would have no problems with work life balance. These managers had failed to understand that work life balance is not just about what happens at work but can also be affected by home issues. Again the good manager will get to know their team members and gain an insight into what their work life balance issues are. One of the more troublesome issues surrounding the quality of the manager

is the organisational tendency to sub-divide into cliques. This is not just in the Fire & Rescue Service, and happens in many organisations, in both public and private sector, but is exacerbated by the competitive nature of this organisation: promotion is no longer dependent on knowledge and experience but on a management perception of the personal qualities and attributes, and so the ability to "fit in" with a particular group or clique takes on a greater importance.

The skills, knowledge and experience of older workers is often overlooked or forgotten by their younger managers and supervisors, and the older workers reported feeling sidelined as a result. This is partly attributable to reluctance by some older workers to push themselves forward but also to lack of easily accessible personnel records that could give the manager the information they need to know in order to decide what project to give to which person. WMFS has a byzantine system of recording training, qualifications and competences that relies upon the individual employee identifying their own training needs and then recording when they think they've evidenced competence. Managers ought to discuss this with the individual prior to signing it off but the system was said by some respondents to be open to abuse and many managers seemed to sign off competences without any discussion with the individual concerned. Many respondents referred to their managers and supervisors showing a complete lack of interest in their abilities despite the fact that the organisation had paid for all of their training and qualifications, and this is not only demotivating but also a waste of resources, particularly at a time of austerity. A follow-up training workshop for older workers was piloted with the organisation, and that demonstrated that one day's input could help to reverse the feelings of disempowerment, and re-invigorate the career plans of older workers in the FRS (Leibold & Voelpel 2007). This could then be complemented by a shorter session for younger managers to gain more understanding of

inter-generational management issues such as motivation and performance management.

The fact that some older workers become disillusioned by their lack of promotion to the higher levels of the organisation, while others are driven by ambition to reach the top at all costs, highlights the need for high levels of management ability. Both groups require careful management to avoid disruption, but it seems from the responses that many managers lack the basic techniques and management skills to manage these tricky situations. Included in Chapter 2 is a table of the recommended competencies of good management as proposed by CIPD (2011) following research on employee engagement, and these competencies could easily form part of the management and leadership development programmes in the organisation. This simple addition could help to transform the wellbeing and work life balance across the whole organisation, not simply for the older workers, and that would have a number of additional business benefits, including improved employee engagement and productivity.

Funding cuts have affected the whole of the Public Sector following the economic downturn in 2009-2011 and have resulted in a number of organisations trying to deliver the same level of service with a much reduced workforce. The mantra of doing “more with less” is guaranteed to cause problems with work-place stress, staff sickness absence and a general reduction in service, and yet so many organisations seem to think that simply loading more and more work onto a diminishing staff base will have no adverse effects (Bartlett 2009) The situation in West Midlands Fire Service is exacerbated by the fact that brigade managers have little or no idea how many hours are being worked by their uniformed staff; the findings clearly show that a large number of employees routinely work more hours than their contracts stipulate for a wide variety of

reasons. While it is of course up to individuals to decide whether to donate their own time to their employers, it makes it very hard for an organisation to fully assess its strength when it is making redundancy decisions. Whether a decision to work longer hours is a personal one, or one encouraged by a manager, or simply dictated by circumstances, the findings show that there is an implicit expectation that staff will put in many extra hours. And the danger here is also that tired people make poor decisions, and these people work in a safety critical environment. A related problem for the employers is that of presenteeism: when members of staff come into work even though they are unwell, or simply stay longer at work in order to be noticed and considered to be loyal. Several respondents (n=35) reported working regularly more hours than they were contracted to, and yet there is no evidence that the organisation is more productive as a result. Indeed evidence was mentioned in the literature review to suggest that presenteeism actually reduces productivity regardless of the reason why employees are putting in their extra hours (Langham 2003). This practice should be discouraged as it does little for the overall productivity and effectiveness of the organisation. A further aspect of this presenteeism is the tendency of both uniformed and non-uniformed staff to not take all of their earned rota days, holidays and time off in lieu. If a flexi-duty officer works on 24-hour cover over a weekend and then fails to take their allotted rota days the net result is that the officer could be working 12 consecutive days without a break, and the quality of their decision making must surely be suspect. A very salutary lesson can be gained by reading the US Chemical Safety & Hazard Investigation Board report (2007) on the BP oil refinery explosion in March 2005 at Texas City (which killed 15 people and injured 180). The report places the blame on a combination of relentless cost cutting, inadequate monitoring and supervision, and the increased levels of overwork and fatigue of the operational staff. There are many other examples that

illustrate the fact that simply expecting the remaining staff members to take on the additional workloads of their former colleagues will not result in currently high quality work being continued.

The most straightforward way to eliminate the risks of burnout, fatigue and cognitive weariness is to re-assess and improve job design and job resources in order to reduce job demands to a manageable level. To design or re-design the job in order to improve the job resources at a time of economic constraint may seem to be a daunting task, but good job resources such as improved internal communications; supportive managers, supervisors and team members; support from HR for managers when taking difficult decisions; these are not impossible to achieve, nor are they an expensive option, and yet they could create significant improvements. Whereas poor job resources such as irregular and complex shift patterns, uncaring and ineffective managers, low levels of peer support (often combined with high levels of competition for a relatively few choice positions) and potentially hazardous working conditions are bound to create a situation where high levels of stress, fatigue, burnout and cognitive weariness are more likely. Such basic improvements are likely to have an additional benefit: that of improved work-home interface, so that there should be fewer problems from home life leeching into the work arena. Despite the fact that managers do not understand that situations at home can influence the work life balance of their team members, they do seem to understand that improving those situations for themselves will have a beneficial effect, and so job design is an important tool in improving work life balance, which will retain the skills and motivation of the workforce. It is well known that motivated workers are more productive, and healthy workers have fewer days off sick, and workers who feel appreciated will continue to offer their skills to the organisation.

Considering the organisation policies and their impact upon the work life balance and well-being of the older workers, one of the most beneficial was clearly that providing for flexible working. For non-uniformed staff, flexible working has improved their work life balance immeasurably by allowing them to fulfil their contract of employment while taking the time they need to spend on family or other activities. WMFS has an exemplary flexible working policy: however not all managers understand that flexible working still means staff members working the same hours, just at different times. And for a policy to be effective there must be the organisational will to ensure that staff are not discouraged from taking up the policy and this will require action and commitment from the top of the organisation. This applies to all policies operating in the organisation.

There are also a number of policies introduced by the employer that can improve the work life balance of staff. The research asked respondents to indicate which policies within WMFS had the most beneficial impact on their work life balance. Those that were seen to be most beneficial were the provision of Occupational Health, on-site parking, flexible working, on-site fitness facilities, and family related leave including maternity / paternity leave. However, thirty respondents claimed not to know about one or more of the various policies, and this could be partly the result of the organisational culture which seems to discourage the take up of, for example, flexible working, or maybe they are simply not well promoted within the organisation.

The impact of shift working on the work life balance of the uniformed older workers has been discussed in earlier chapters and presents a challenge to any organisation required to provide a service at all times of the day or night. While there has been a steady decrease in the number of domestic house fires, the organisation still has to be

available to respond quickly to a wide range of other non-fire related emergency incidents such as flooding, road traffic collisions, and even the threat of terrorism. So shift working is bound to continue. The challenge is how to maintain an efficient emergency service while accommodating the health and wellbeing (and therefore the productivity) of the ageing workforce. The physical demands of the job are sometimes more difficult to cope with and older workers may require extra time to get over injuries and complex shift patterns. However, some respondents preferred working shifts as it gave them the opportunity to spend more time with their family, for example collecting the children from school or taking them on days out. Work life balance issues for these people had arisen when their shifts had changed, or they had moved from shifts to working Monday to Friday 9-5; this was a transition point in their family life that many had found an inconvenience. Often this change in working conditions had happened at the same time as change in their personal situation, for example when an illness or minor injury required them to request less physical activity.

Promotion to a more senior role, whether temporary or substantive, can impact working hours by placing the manager on the flexi - duty rota. This will increase the number of hours that the manager has to be available for work from 42 to 72 each week by being on cover two nights a week and one full weekend in six. While it is not likely that serious incidents would occur every time the manager is on cover they still have to be ready to respond and that can impact family life. Consideration could be given to the recommendations by Lancs FRS to introduce self rostering for flexi duty officers.

Many respondents said that while they had been happy to work shifts when younger, they were finding it more difficult to recover from the night shifts as they got older. This comment had been made frequently by those who were still angry at the removal



of the beds from fire stations but was also noted by those who simply found that, as they were getting older, they were experiencing increased tiredness. This could have a major impact on the Fire & Rescue Service following the abolition of the Default Retirement Age and the changes to the Firefighters Pension Scheme; uniformed staff will be expected to continue working beyond the previous retirement age in order to receive their pension, and be able to work beyond State Pension Age. While those in an administrative or support role would have less difficulty in continuing their work beyond their expected retirement age, this is likely to be more challenging for older uniformed staff, whose roles can be more physically demanding. One option could be to offer older firefighters roles or tasks that are less physical, such as driving appliances, however the current expectation is that all firefighters should be competent in all their roles and this course of action could reduce competence for the younger firefighters. There are, of course, plenty of roles that do not require the same levels of physical activity, for example training, HR, administration, and WMFS has plenty of former uniformed staff who have returned in non-uniformed roles following retirement, so it should be possible to find a way to move staff onto less physically demanding roles if the need arises.

## **8.2 Implications for the wider public sector**

So, what among these findings could be of use to the wider public sector? Certainly the lack of understanding of the work life balance issues of all staff, whether operational, administrative or other support functions will have a detrimental effect upon those staff whose personal or work circumstances are ignored or misunderstood by their managers and supervisors. This is particularly important for older workers who are likely to be

remaining in the workplace for several years longer than they originally planned in order to qualify for their state and occupational pensions.

And more importantly, it is very clear that the behaviour, skills and abilities of the managers themselves is of crucial importance in improving or damaging the work life balance and well-being of their team members, and this can so easily be remedied by training and coaching of managers. The skills and experience of older workers, if properly recorded and referred to, can be an invaluable tool to enable an organisation to remain productive, even in times of recession. Good work life balance policies are of course important, but again it is more important for management to make sure that the organisational culture does not discourage individuals to take up those policies.

Public sector organisations are likely to be under continuing financial pressure for some years to come and, after making the easy efficiency savings, will inevitably have to reduce staffing levels: and it will simply not be possible to continue to try to do everything that was once achieved only with many more employees. “More with less” will not provide lasting improvements as tired and overworked employees will become less and less productive. It is absolutely essential that these organisations re-think what service levels they can provide with the funding they have available in order to continue to remain efficient. Retaining the skills of good staff, without overloading them and ensuring they enjoy good work life balance, would be a sensible use of their remaining resources.

### **8.3 Final thoughts**

As stated in the Introduction, the research question gave rise a number of additional questions:

“do older workers have any work life balance issues at all? And if so, are those issues specific to their age cohort or are they more generally encountered by all age groups? If older workers are dealing with work life balance issues, does the approach and transition through retirement (and for some un-retirement or re-employment) have an impact? Does planning for retirement, and having some control over the manner of retirement, improve work life balance in the final few years of employment? And does the organisational culture of the Fire & Rescue Service affect the work life balance of its older workers?”

The research clearly shows that many older workers were affected by work life balance issues, depending upon their home and family circumstances as much as what was happening to their work environment. While some of those issues were shared by other age groups, as identified by the Networking Women in the Fire Service sample, there were some issues that were directly attributable to their age; for example, the joint care of children and elderly parents within the home sphere, and their treatment by their younger supervisors and managers at work. With regard to the approach to retirement, the lack of planning does not appear to have adversely affected the respondents prior to their retirement date, but those who have retired regretted not having done more financial and social planning prior to leaving, which had prompted some to un-retire and probably take more time to plan the second time around. However, the lack of preparedness warrants further study. Finally, the organisational culture was instrumental in a number of ways, for example in the general treatment of older workers by younger managers, and also by discouraging a wider take up of work life balance policies.

## **Appendix**

1. Email sent out with the Work Life Balance Questionnaire
2. Work Life Balance questionnaire
3. Email questions sent out between September and December 2010 to 20 volunteers
4. Email to prospective retired interviewees
5. Table of WMFS respondents

## **Email sent out with the Work Life Balance Questionnaire**

Re: Work Life Balance research

We have agreed to support Anita Pickerden in her PhD research on work life balance. She is looking at the issues that face older employees throughout the organisation, and therefore this email is being sent out to all WMFS employees aged 45 or over.

Please complete the attached questionnaire and send it to [anitapickerden@blueyonder.co.uk](mailto:anitapickerden@blueyonder.co.uk) or print it off, complete it and send it in a sealed envelope addressed to Anita Pickerden c/o Wendy Browning Sampson. Please return the questionnaire by Friday 9<sup>th</sup> July 2010.

Anita has asked us to emphasise that all replies will be treated in the strictest confidence, and individual comments will not be identified or divulged to any member of WMFS, and will not be identifiable in the final research report.

The second stage of her research will happen later in the year, and some people will be invited for a 1 hour interview to discuss aspects of their work life balance. Others will be invited to respond to a short email question on a fortnightly basis, to see if their feelings about work life balance change over time.

Anita will be presenting her preliminary findings at RE10 at the Fire Service College in November.

Thank you for your assistance,

## Work Life Balance questionnaire

This research is looking at the Work Life Balance issues that happen to people working for the Fire & Rescue Service during the latter half of their working lives. I have chosen to concentrate on people aged 45 and over, as there is already a lot of research about the issues facing younger workers.

The first part of this questionnaire is about you and your own feelings about your work life balance, and whether this changes as you get closer to your retirement.

The second part is about the steps already taken by the fire service to help your work life balance, and whether those have worked, and whether there is anything else that the fire service can do to help you to perform your job well without suffering from a poor work life balance.

Please be assured that every answer you give will be treated in the strictest confidence and your answers will not be personally identifiable to any other person.

While it is my intention to feed back in a general way, to highlight good practice where it exists, and to point to any areas that could be improved, I will not divulge any individual answers or comments made on any of the questionnaires or during interviews. These might be reproduced in my PhD thesis but will not be attributed to any identifiable individual.

I shall be presenting my preliminary findings at RE10 at the Fire Service College in November.

You do not have to answer all the questions if you don't want to, although the more questions you are willing to answer the better it is for my research.

There is space for you to add your personal comments after each question, and I would be grateful if you could expand on any of your answers as this will add depth to the research.

### About you

Your Age	Gender	Ethnicity
Role, employment position and location of work		
Normal hours/pattern of work		
Your length of service with the fire service		

### About you and your work life balance

1. What does the phrase “work life balance” mean to you?
2. Do you consider yourself to have a satisfactory work life balance? Yes / No / Sometimes
3. Do you feel you are in control of your work life balance? Yes / No / Sometimes
4. If I were to describe your regular paid work with the Fire & Rescue Service as your ‘first shift’, what would you describe as your main ‘second shift’ activity? Please tick all that apply.

	Activity	✓	Comments
A	Family responsibilities		
B	Children?		
C	Parents?		
D	Both?		
E	Other?		
F	Housekeeping		
G	Voluntary activities		
H	Social activities		
I	Studying		
J	Other paid employment		
K	Self-employment?		
L	Another employer?		

5. Which ‘shift’ is most important to you? First or second?

### Balance and boundaries

6. Do you prefer to keep a strict boundary between your first and second shift? Yes / No
7. Does one shift affect your abilities to perform the other shift? Yes / No

If so, which shift affects the other? In what ways?

8. What is it that makes your work life balance good or bad at present?

Good?	
Bad?	

9. Has your work life balance (however define it) got better or worse over the past few years?

Much better ?	Better ?	No change ?	Worse ?	Much worse ?
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In what ways?

10. Has your work life balance been affected by changes in your pattern of work? Yes / No

Or has your work life balance been affected by changes in your personal circumstances?

Yes / No

Other reasons? Please specify:

11. How many hours per week do you regularly work?

12. Do you ever work longer than your contractual obligations? Yes / No

How often does this happen?

Who decides – you or your manager?

13. What is your main reason for working longer hours?

14. Does your current role / rank / position mean that you feel under pressure to put in extra hours at work? Yes / No

Why / Why not?

15. If you stay late to complete an important task, do you claim time off in lieu or flex leave?

Yes / No

16. Do you always take your rota days and/or full holiday entitlement within your leave year?

Yes /

No

Why / why not?

#### **About the Fire & Rescue Service and work life balance**

17. Why did you decide to work for the FRS?



18. When you were thinking about joining the FRS did any work life balance issues (such as shift working) affect your decision?

19. Why have you decided to continue to work for the fire service?

20. When you were thinking about remaining with the fire service, did any work life balance issues (such as shift working) affect your decision?

21. All in all, to what extent would you say that your fire service helps workers to achieve a balance between their work and family responsibilities?

22. Have any of these policies or procedures have improved your work life balance [☺]? Which have had no impact [☹], and which do you think have damaged your work life balance [☹]

Policy	Has this policy made a difference?			And how important is this policy to you personally?			
	☺	☹	☹	Very	Fairly	Not at all	Don't know about it
a. Flexible working							
b. Part time working							
c. Pre-retirement planning							
d. Semi-retirement							
e. Reward & recognition							
f. Flexible duty systems							
g. Fitness facilities on site							
h. On-site parking							
i. Occupational Health							
j. Maternity / Paternity leave							
k. Restricted / Light Duties							
l. Other family related leave							
m. Time off for public duties							

Comments:

**About your retirement planning**

23. Are you making plans for your retirement? Yes / No

24. At what age do you expect to retire?

25. Do you expect to

A. ease into retirement by gradually reducing your hours? Yes / No / Not sure

B. continue working the same hours but doing lighter work? Yes / No / Not sure

C. continue working the same hours and same job until the day you retire Yes / No / Not sure

D. continue the same work intensity but in a different job role? Yes / No / Not sure

26. Have the changes in pensions arrangements affected your decisions about your retirement?

Yes / No / Not sure

27. What do you intend to do after you retire from the fire service? Please tick all that apply.

		✓	comments
A	Nothing at all		
B	Pursue leisure activities; new or existing		
C	Studying		
D	Voluntary work in the community		
E	Paid employment with a new employer		
F	Paid employment with the same employer in the same/similar/different role		
G	Self-employment		
H	Other? (please specify)		

**Do you agree / disagree with the following statements**

Please add any extra comments at the end of this table

	Agree	Disagree
28. There is strong management support for work life balance in the fire service		
29. My line manager is a good example of good work life balance		
30. Taking family related leave is not likely to adversely affect my promotion prospects		
31. The culture of the fire service is too strong to be changed by work life balance policies		
32. My line manager expects me to work extra hours		
33. Work life balance policies only benefit the female staff.		
34. If I work extra hours it will help my promotion prospects		
35. If I needed to work more flexibly then my line manager would help me to apply for flexible working.		
36. Work life balance is not a problem for people in the fire service.		
37. I am willing to sacrifice my personal life to fulfil my responsibilities to the fire service.		
38. I demonstrate my commitment to the fire service by working longer hours.		
39. Good time management helps my work life balance		

Comments:-

## **Email questions sent out between September and December 2010 to 20 volunteers**

September:

Thank you for agreeing to respond to further questions. I should like to send you a short email every three weeks or so to ask how you are feeling / thinking about your work life balance. This is to see if your views change over time, or that they are fixed. I have chosen this time period to cover different aspects of any shift working, flexi time or rota days that you might have taken.

My plan is to email you about four or five times between now and the end of the year, but of course you are free to not answer any of the questions, or to let me know that you no longer wish to be involved.

My first questions are as follows:

- 1. What has your work pattern been like over the past few weeks?**
- 2. How would you currently rate your work life balance? 1 to 10, 1 being excellent and 10 being very bad.**
- 3. Has anything happened recently (at work or home) to affect your view of your work life balance?**

Thank you very much for your support with my PhD

Anita Pickerden

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October

Thank you for completing the last questions: here are the next few questions, and again I am interested in your perception of your work life balance, but would also be interested in how that could be improved.

As before, if you do not wish to answer anything, just leave the question blank, or let me know that you wish to withdraw.

I have attached your earlier answer so you can judge whether things are getting better or worse than last time.

- 4. Do you feel that your work life balance has improved or deteriorated since your last answer? If so, why?**
- 5. How would you currently rate your work life balance on a scale of 1 to 10, 1 being excellent and 10 being very bad.**
- 6. What would improve your work life balance at the moment?**

Many thanks,

Anita Pickerden

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November:

Thank you for returning the last questionnaire. Your answers are really helping me with my research, as I am getting a picture of your perceptions of work life balance over time, and seeing whether these are affected by external factors at home or at work

Here are the next set of questions (and I do promise that there will only be four sets of questions in total), and I attach your previous answers so you can see what you wrote.

**7. What has your pattern of work been like over the past few weeks?**

**8. How would you rate your work life balance on a scale of 1 – 10, with 1 being excellent and 10 being really bad?**

**9. What would you say about the work life balance of those around you?**

Thank you for continuing to support my research. I shall be contacting some of you early in the new year to see if you are willing to be interviewed, and will attempt to arrange interviews at a time and location that is most convenient to you.

Best wishes

Anita

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December:

Thank you for your answers to my previous questionnaire. Here is the final set of questions and I have attached your previous answers for you to compare:

**10 What has your pattern of work been like over the past few weeks?**

**11 How would you rate your work life balance on a scale of 1 – 10, with 1 being very good and 10 being terrible?**

**12 How is the recession / cuts in public sector spending affecting your work life balance, and those around you?**

Thank you for continuing to support my research, and I do hope you will be taking some leave over Christmas.

Best wishes

Anita

## **Email to prospective retired interviewees**

Dear

Thank you very much for agreeing to take part in this stage of my research into work life balance in the Fire & Rescue Service. I would like to meet with you and ask you some questions about your work life balance while you were an employee of West Midlands Fire Service.

I set out below the sort of questions I would like to ask, and a participant consent form that we can both sign at the interview.

I would be grateful if you could let me have some convenient dates and times when I could visit you for about an hour to conduct the interview.

Many thanks

Anita Pickerden

## **Questions**

- a) Looking back over your whole career where would you say were the work life balance pinch points?
- b) Over the final five years were there any changes in the way that you were treated by your managers and/or other colleagues?

How could WMFS have helped your work life balance when you worked there?

When you were there, did you take your time off in lieu / rota days / holidays?

How did you plan for your retirement?

Given how you are now, would you have done anything differently?

What do you do with your time - leisure, work, study etc. – and is that what you had planned?

How would you rate your current wellbeing?

Have you thought about “un-retiring”?

## **Participation Consent Form**

My interviews aim to look at the Work Life Balance issues that happen to people working for West Midlands Fire Service during the latter half of their working lives. Please be assured that every answer you give will be treated in the strictest confidence and your answers will not be personally identifiable to any other person.

While it is my intention to feed back in a very general way to WMFS, to highlight good practice where it exists, and to point to any areas that could be improved, I will not divulge any individual answers or comments made on any of the questionnaires or during interviews.

Verbatim words and phrases might be reproduced in my PhD thesis but will not be attributed to any identifiable individual.

You will not have to answer all the questions if you don't want to, although the more questions you are willing to answer the better it is for my research, and you are entirely free to stop the interview and withdraw your consent at any time.

Signed: Anita Pickerden

Signed:

.

Date

Date

<b>Table of WMFS Participants</b>					
<b>Age</b>	<b>Gender</b>	<b>Ethnicity</b>	<b>Current Role in WMFS</b>	<b>Normal hours worked</b>	<b>Length of Service</b>
-	-	-	Station manager	-	-
50	F	W	Fire Control operator	shifts	2.5 years
-	F	W	Local area liaison officer	36.5	3yrs
48	F	W	Project Support Officer	full time	9yrs 7m
50	F	W	Corporate Planning Officer	36.5	3yrs 9m
48	F	W	Admin Officer	0800-1300 1400-(I vary the time I go home from any thing a	30yrs
49	F	W B	word processor operator	4.34 hours a day Tuesday to Friday	7.5 yrs
50	F	W	Watch Commander	42 average	31 yrs
54	f	W other	manager	36.5	20 yrs
50	F	W B	Community Safety admin asst	36.5	5yrs
46	F	W B	Fire Safety Inspecting Officer	6 hours a day – five days a week. Usually 0850 - 1450	27yrs 8m
50	F	W B	Senior Contracts manager	36.5	25yrs
60	F	-	systems dev manager	36.5	21yrs
47	F	English	Liaison Officer	flexible	14yrs
48	F	British	CAD operator	full time	29yrs 8m
60	F	W B	Fire Safety Supervisor	36.5 hrs	19yrs 10m
46	F	W B	(Temporary) Crew Commander	42	5yrs 10m
50	F	British	GIS Data Processor	30 hrs over 4 days	9yrs
61	F	W B	HR Admin assistant	36.5	4yrs
48	F	British	Station Admin Officer	13:00 – 16:45 Mon - Fri	8yrs 6m
46	F	British	Watch Manager,	42 hours week, Monday to Friday	27yrs 6m
46	F	English	Buyer/Contract Manager in Procurement	36.5	11yrs 8m
45	F	W	Deputy Supervisor of the WP Unit	Flex time, but usually work 0715 to 1645 hours	21yrs
61	F	W E	CAD operator	18.25 hrs	20yrs
45	F	W B	Admin Supervisor	36.5	9yrs
60	f	British	Support Admin	8.30 - 4.30 flexi	7 years



Age	Gender	Ethnicity	Current Role in WMFS	Normal hours worked	Length of Service
55	F	W	Clerical	9.00 - 5.00	9yrs 9m
60	F	English	Cook	19.5 hrs	2 yrs
48	M	W B	Crew Commander	48hrs	21yrs
51	m	w	Station Commander	42 + All over the shop	26 yrs
54	m	w	driving training manager	8.45-5.15	34 yrs
50	m	b/sikh	ICT	37	14
49	M	W	Watch manager A -Cov Fire Safety	9 day fortnight	22yrs 9m
-	m	w	Watch manager Fire Safety Insp	9 day fortnight	25 yrs
53	M	-	-	-	20 yrs
50	M	w	Watch manager A	9 day fortnight	22 yrs
57	M	W	Qualifications coordinator (temp)	37.5	9.5 yrs
50	M	W	Watch manager B	9 day fortnight	29 yrs
49	M	W	CC education team	9 day fortnight	30 yrs 8m
45	m	w	Watch manager	9 day fortnight	28 yrs
49	M	W B	Group Commander	flexi duty	28yrs 6m
45	M	Welsh	Watch Commander	42 hr	26yrs 5m
46	M	W	firefighter	42 hrs 2 x 10 hr days 2 x 14 hr nights	28 yrs
52	m	-	-	42 over 6 weeks	-
45	m	w	Watch Commander	48hrs 2X 10hr day shifts followed by 2x14hr night shifts ar	22yrs 6m
45	m	w	Area commander	flexi duty	26 yrs
46	m	w	Watch Commander	2days 2 nights rota days	28 yrs
-	M	-	-	-	-
47	M	W/irish	Watch Commander	core shift	28 yrs
48	M	W	photographer	Flexi Shift with 1 week in 4 covering out of hrs jobs in addi	5 yrs
52	M	W	Community Advocate Solihull Fire S	8 to 4 ish with some evenings and some weekends (Flexi h	3 yrs
56	m	w	Watch Commander	2day 2 nights 4 Rota	28yrs
49	M	W	Youth Services manager	36.5 hours, making most use of flexitime and lieu leave arra	8yrs
49	M	W	WM B – Legal Support Officer	9 day fortnight shift system = 9hr 50min as a standard day	31yrs

Age	Gender	Ethnicity	Current Role in WMFS	Normal hours worked	Length of Service
45	M	W	Watch Commander	42 hrs days	12yrs
48	M	British	Senior Systems Developer	9-5 M-F	2yrs
-	M	W B	Fire Safety Inspecting Officer	36.5 hours Whole time flexible hours	35yrs
48	M	W	Station Commander	42 positive hrs and 36 cover hrs per wk	26 yrs
-	M	W	watch manager	shifts	31.5yrs
45	M	W M	watch manager	42	23.5yrs
50	M	W B	Watch Commander	2,2,4	29yrs
48	M	-	ITC	9.30-5.30	2yrs 6m
48	M	W	Stn Officer	08:00-16:50 plus 90+ on call days over the year	25yrs
57	M	W	ITC	37	5yrs
45	M	W	Watch Commander	2day 2nights	15 yrs Fire service 9 yrs WMFS
58	M	W B	Group Commander	78 hr flexi duty	37.5 yrs
48	M	W B	Crew Commander in development	shifts	27yrs
-	M	-	Crew Commander	48	21yrs
45	M	African Heritage	Group manager B	flexi	25yrs
48	M	English	(Acting) Watch Commander A	42	21yrs
49	M	W EU	W manager B in Commnd Development	9 day ftnt	26yrs 3m
-	M	-		42 average	24yrs
54	M	W B	Fire-fighter	42 hours per week. 4 on 4 off	27yrs
46	M	W B	WMB Fire Safety Officer	Mon-Fri ( Day Fortnight) Usually 07:00 hrs til 15:50hrs (30)	26yrs 3m
49	M	W	Watch manager B	42 hrs	26yrs 6m
57	M	W	Specialist Fire safety Officer	42 hr 9 day ftnt	27yrs
47	M	W B	manager	37	3
49	m	w b	Fire-fighter	48	29yrs 9m
46	M	W B	Fire-fighter	10-22.00 4on 4off	5months
-	M	W B	Watch Commander	9 day fortnt 8 - 17.00	28yrs 5m
46	M	W	Station Commander	flexi duty	27yrs
49	M	W B	Watch Commander operational	Lates - 4 x 12 shifts 1000 – 2200	31yrs

Age	Gender	Ethnicity	Current Role in WMFS	Normal hours worked	Length of Service
48	M	W	Watch Commander	D D N N	31
56	m	wb	Warehouse & Distribution Supervisor	37mon-fri	20yrs
49	M	British	Watch Manager B at HQ	9 day fortnight	26yrs 6m
46	M	WB	Station Commander	78 hours per week, varied shift over a 6 week rota	26yrs 6m
48	M	WB	Group Commander	Flexi duty	28yrs
46	M	W B	Fire-fighter	2 days,2 nights 8am to 6pm days,6pm to 8am nights	17yrs
58	M	W	Grade 14 Trng Prog manager	36.5 hrs flexi	33yrs
47	M	W B	Group manager A	flexi duty	28yrs
50	M	W E	Fire-fighter	Shift system 2 days, 2 nights	23yrs 6m
45	M	W B	Watch Commander	42hrs	16yrs
50	M	British	Watch Commander	2days 2 nights 4 off	7yrs
49	M	W B	Watch Commander B	42hrs days Mon-fri	31yrs 9m
46	M	W	Watch Commander	42hrs 9 day ftnt	24yrs
46	M	British	Crew Commander	2 days,2 nights	21yrs
49	M	W Eng	Station Commander –	flexi duty	32yrs
51	M	British	Crew Commander	shifts	26yrs
45	M	Scottish	Crew Commander	2,2,4	9yrs 4m, Fire Service 21yrs 5m
47	M	W	Watch Manager B	Lates shift 10am – 10pm. 4on 4off, 8 day cycle	17yrs
46	M	W Eur	Fire-fighter	42hrs wk various pattern	7yrs
47	M	W B	Watch Commander	42hrs/shift based	28yrs
46	M	W B	Clerical assistant in Registry	36.5	4yrs
47	M	W B	Watch Commander	42 hrs 2 days/2 nights	22 yrs
46	M	W B	Watch Commander A	9 day fortnight	20yrs 5m
48	M	W B	middle manager	78	20yrs
45	M	W Irish	Watch Commander	station based	24yrs
46	M	W Eur	Fire-fighter	2/2/3 +24/48 cover	25yrs
46	M	o-Caribbean	Crew Commander in development	48 hrs 2 x 10 hr days + 2 x 14 hr nights over 8 weeks, avera	19yrs 6m
50	M	W	CFO Policy & Communications Adv	42hrs wk	25yrs

<b>Age</b>	<b>Gender</b>	<b>Ethnicity</b>	<b>Current Role in WMFS</b>	<b>Normal hours worked</b>	<b>Length of Service</b>
48	M	W B	Fire-fighter	2 days 2 nights	3yrs
47	M	B	Crew Commander	48hrs 2-2-4	21yrs
55	M	W E	Principal Workshop Technician	06:45 – 12:45 (Early) 09:00 – 17:00 (Core) 12:15 – 20:15 (Late)	7yrs

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