

Productivity and wellbeing through family audit

Summary

The Family Audit Certification was initiated in 2008 by the Italian Province of Trento through its Agency for Family, Birth and Youth Policies. The regional project commenced in 2012, and was following a national trial.

The family audit is based on a well-developed methodology. A working group is set up with the organisation, which is advised by an external consultant. After carrying out an audit, each organisation develops a three-year Family Work-Life Balance Plan listing actions that the organisation plans to take in six areas (work organisation, work-family balance culture, communication, fringe benefits and services, family district, new technologies). Its implementation is monitored by an external evaluator.

So far 111 organisations have been involved in the Family Audit process, (44 public, 67 private), and 88 have been awarded the Family Audit Certificate, benefitting 35,000 workers. It has led to a network of stakeholders (unions, employers, family and social organisations, research organisations etc.) helping to promote awareness. The certificated organisations are listed on the family audit website.

The entire family audit process is monitored for a relatively long period of time. A study of the impact of work-life balance plans on a sample of 18 organisations showed the tangible benefits of carrying out family audits; another study showed the positive impact of reconciliation of work and family life within the organisation and across the region. The two most notable benefits are better employee wellbeing and increased productivity. Family audit certification also benefits companies by opening up access to tenders for public contracts, and is a tool for organisational improvement.

The practice is transferable, but its costs might be an issue in a time of economic crisis.

Friends of the family

The policy context for the Family Audit process can be found in the Family Policy Intervention Plan approved in 2004 and the White Paper on Family and Birth (2011) both of which aim to make the Trentino Region a family-friendly territory which is attentive to the interests and needs of its citizens.

The family policy adopted by the Autonomous Province of Trento includes many interventions promoting not only social aid but also the well-being of families, and relies on cooperation between government and local councils, as well as networking between all social actors, profit and non-profit associations.

The community becomes a “friend of the family” thanks to the *Family in Trentino* brand name, which is granted to private and public organisations (such as municipalities, museums, restaurants and hotels) that launch services for resident and transient families. The brand is awarded by a committee formed by the provincial executive body and according to specific sector standard criteria. The organisations that have been awarded the brand are listed on the websites www.trentinofamiglia.it and www.familyintrentino.it.



The Family Audit certification was launched in 2008 at the local level in Trentino, a frontier province that lies in the heart of the Alps, midway between two of the most highly developed areas in Europe: the Po valley and Bavaria. The province includes about half a million inhabitants, less than 1 % of the Italian population. It is led by the province's Department of Family Policies. In 2012, the process was rolled out nationwide by the Autonomous Province of Trento under a national trial approved by the Presidency of the Council of Ministries (Department for Family Policies of the Ministry for International Cooperation and Integration). The Italian government is considering funding a second national trial.

The Family Audit drew on the experience of the "*Audit Beruf und Familie*" introduced in Germany in 1995 and similar experiences in Austria and the Italian Autonomous Province of Bolzano. The methodology was adapted to the characteristics of the local territory.

Benefits at three levels

The measure targets both public institutions and private companies and aims to improve human resources policies for work-life balance, paying particular attention to the time devoted to work and family life. The specific objectives are:

- a) For the employee: to be able to choose to work in an organisation which opts for work-life balance policies that result in a positive working environment, and on a human resources level the employee's motivation and satisfaction is increased creating more productive and supportive work relationships;
- b) For the company, public institution, association, group or any other organisation that implements the Family Audit certification: increasing the quality of the relationship between personal life and work is fundamental to raising the quality of employees' work performance, to increase productivity, to reduce absenteeism and labour turnover, and to decrease gender differences related to family responsibilities;
- c) For the territory: improving the sense of community and cooperation in order to provide a better basis for social responsibility as this helps the community, workers and their families to overcome daily difficulties.

A three-and-a-half year process of change

The process of certification is a management tool that promotes cultural and organisational change within commercial or public-sector organisations through the adoption of human resources policies which improve the wellbeing of employees and their families while furthering the organisational mission. The process lasts three and a half years: six months for auditing and three years for the adoption of the internal Work-Life Balance Plan. Once the process is complete and the certification obtained, the entity is allowed to use the Family Audit brand and furthermore can decide to extend the programme for three years.

The entire audit process is monitored by two external certified professionals, a consultant and an evaluator, who are both certificated by the Autonomous Province of Trento and listed in the Public Consultant or Evaluator Family Audit Register. The consultant supports the implementation of the audit process, specifically designing the internal survey and the work-life balance plan. The evaluator verifies whether the organisation is implementing the Family Audit according to the guidelines. The method and the implementation of the Family Audit standard are illustrated in the guidelines.¹

The audit process

The process starts with an analysis of the workers' needs and expectations. The organisation appoints a family audit representative and a working group, initially supported by the external consultant. Workers' care obligations are surveyed. A progress evaluation is carried out by the external evaluator. Finally the Family Audit Advisory Board evaluates the quality of the work, issues the certificate and authorises the use of the brand.

The advisory board is composed of representatives from the institutional, academic and economic sectors, associations for the protection of collective interests and family

¹Provincial Law no. 1/2011 and guidelines approved by the Provincial Council of Trento, resolution no. 1364/2010: <http://www.familyaudit.org/?q=node/23>

associations, and the Presidency of Italy's Council of Ministries (Department for Family Policies of the Minister for International Cooperation).

An annually-updated human resources data survey is used to generate a picture of the composition of each employee's status within the organisation. This analysis yields indicators such as gender, qualifications and position, and also information on how human resources are managed i.e. type of contract, average age, care needs, absence, leave, career progression, flexibility, turnover, training courses, etc.

The certification body, the Autonomous Province of Trento, extracts a synthesis and elaborates the data according to work-family balance indicators. The synthesis is published on the Family Audit platform.²

The other tool that each organisation develops is called internal Work-Life Balance Plan. The plan contains actions that the organisation intends to take during the three-year process. In order to finalise the plan, an internal survey within the organisation is conducted through workshops with the support of the external consultant.

11 topics weighed in the balance

The work-life balance plan is arranged under six headings divided into 11 topics:

Work organisation:

- 1.a.1. time scheduling
- 1.a.2. work process
- 1.a.3. workplace: telecommuting, decentralised work, etc.

Work-family balance culture:

- 1.a.4. expertise of management
- 1.a.5. development of the human resources managing the work-family balance policy e.g. equal opportunities, maternity leave

Communication:

- 1.a.6. finding new tools for internal and external communication

Fringe benefits and services:

- 1.a.7. financial aid: bonus schemes, insurance, etc.
- 1.a.8. family services: medical health support, counselling, family support during school breaks, canteen, use of company's equipment, time-saving services, parental support, etc.

Family district:

- 1.a.9. reorientation of organisation's services according to the Family District³ objectives;
- 1.a.10. corporate social responsibility

New technologies:

- 1.a.11. orientation to ITC services: using new technologies to optimise working time both for the employees and the organisation

Taking each employee's needs into account

The main achievements of the measure are:

For the certification body:

- To date, 111 organisations have taken part in the family audit process, 44 of which are public and 67 private. Eighty-eight of these have obtained the family audit certificate, including organisations involved in the local and national trials. Over 35,000 workers have benefited.⁴
- As a consequence a network has developed among social actors, public, institutional and private bodies, family, social and trade associations, trade unions, research centres and other organisations.

For the organisation:

²http://www.familyaudit.org/?q=banca_dati

³Family Districts are areas where family services are piloted: <http://www.trentinofamiglia.it/Provincial-Agency-for-the-family-parenting-and-youth-policy>

⁴The list of certified organisations is at: <http://www.familyaudit.org/?q=elenco-organizzazioni>

- Active participation of employees in the internal analysis is fundamental to the systemic evaluation carried out by the family audit process;
- The family audit promotes an innovative cultural and managerial approach to human resources and is coherent with the aims of corporate social responsibility;
- The systemic analysis during the process results in management and cultural changes and a greater management engagement with the life of employees;
- Monitoring of the data during the process stimulates managers to be more conscious of the values underpinning their organisation;
- Employee satisfaction has risen;
- The family audit has led to a notable decrease in sick leave and an increase in general employee wellbeing.

The efficiency of the Family Audit initiative is confirmed by local research⁵ and by a study conducted by the University of Bologna, published in the book “Family Audit: la certificazione familiare aziendale”⁶ ~~due to be published shortly~~. The study examined the impact of the work-life balance plans on a sample of 18 organisations and the repercussions on the work, family and private life of thousands of workers and their families. It concludes that the family audit process takes the needs of each employee into account, allows for gender and diversity, and applies solutions such as flexible working hours, telecommuting, part-time work, use of inclusive language in business documents, time banks and customised work schedules.

The Family Audit is continuously evaluated over its four-year ~~year~~ course. An annual evaluation of all the documents and a visit to the organisation are made by the evaluator. Evaluators are experienced professionals who are accredited by the Family Audit Advisory Board and are listed on the public register of evaluators. Overall, the Advisory Board checks on the progress made in carrying out the measures contained in the work-life balance plan.

For the national trial, an additional analysis tool is a biannual report provided to the Board of the Department for Family Policies of the Minister for International Cooperation and Integration.

The certification body also provides a monthly report that monitors the development of the audit process among all the organisations, broken down between the public and private sectors and the many company categories. The certification body has a staff of eight within the Agency for Family, Birth and Youth Policies and is supported by the advisory board.

Increased wellbeing and productivity

The family audit initiative has a number of innovative aspects: it introduces family-friendly measures in line with the needs and expectations of employees and thus represents a bottom-up rather than a top-down approach; the work-life balance plan and its continuous monitoring stimulate quick changes within organisations; and a common information platform makes the data available in open-source format.

The main successes of the measure are that family audit certification benefits employees – both men and women – as well as organisations. The two most notable benefits are better employee wellbeing and increased productivity. Family audit certification also benefits companies by opening up access to tenders for public contracts, and is a tool for organisational improvement.

The family audit initiative is transferable because of its adaptability to different regional contexts. The Italian example demonstrates good governance and knowledge of the local environment and a broad cooperation network. It shows that a competent certification body plays a crucial role in its success. Despite this cultural resistance is still present within some organisations and represents one of the main challenges.

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⁵<http://www.familyaudit.org/?q=node/532>.

⁶<http://www.trentinofamiglia.it/Menu/Pubblicazioni/Altre-pubblicazioni>

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Guidelines: <http://www.familyaudit.org/?q=linee-guida>
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