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State Trustees – Working Parents Program and Client Experience

Who is State Trustees

State Trustees is owned by the State of Victoria and has been operating for more than 70 years.

We are prominent in both the commercial and community sectors providing services to all Victorians including Will preparation, Enduring Power of Attorney (Financial, Medical Treatment and Guardianship), deceased estate administration, trust administration, compensation administration, genealogical services, legal, taxation and financial planning services and personal administration services.

As a community service provider, we manage the financial affairs of almost 9,000 Victorians who are unable to do so themselves due to disability, injury or mental illness. State Trustees has the core purpose of helping people with their financial needs so they can make the most of their opportunities.

The Challenge

As a business, our objective of retaining top talent prompted an investigation into how we can accommodate the needs of our employees, whilst meeting the operational requirements of the business.

One issue facing our business has been women returning and successfully integrating into the workforce following a period of maternity leave. The dynamics of our workforce are indicative of the need to successfully integrate this group, with 64 per cent of our workforce being women. Last financial year 40 women at State Trustees utilised maternity leave.

A study into maternity leave job continuity was conducted (by consulting with employees who had returned from maternity leave) and revealed some key areas of improvement for the business including:

- the need to integrate employees on maternity leave more efficiently back into the workforce
- better communications while on leave
- the need to present flexible job options upon return.

Our research also revealed that many of our employees balance caring responsibilities, especially children and elderly parents, with their employment. Feedback from these employees is that more flexibility in the workplace would allow them to better manage these responsibilities and provide them with greater work life balance. This has been a motivating factor in deciding to provide additional flexibility initiatives and led us to get in touch with Careermums and mums@work.

The Solution

State Trustees purchased both the 'Working Parents' toolkit and the 'Flexible Work Proposal' toolkit from mums@work. We chose these toolkits because they could be easily customised and branded to meet our needs, while saving us time and money collating the information. We then developed an internal online 'Keep In Touch' program as an access point to the toolkits for all employees. The introduction of these resources included briefings and



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conversations with corporate leaders, senior managers and team leaders to ensure all leaders were appropriately informed, engaged and empowered to access the toolkits and have meaningful conversations with employees about flexible working options.

A range of communication strategies and education pieces were implemented to explain the benefits of flexibility provisions to the business and to employees. The most effective means of overcoming any communication barriers came from the employees who actually participated in the flexible working initiatives; these employees were able to communicate their positive experiences to other employees, which in turn filtered up to our management team.

Once it was demonstrated that flexibility was actually a viable option in our workplace, the business began to understand how they could manage flexible work arrangements in their own areas no matter what their role was. Additionally, the People & Culture team worked extremely hard to ensure the business felt supported and our employees were aware that assistance and guidance was available when exploring flexible work options.

Results to date

In the last financial year:

- 84% of employees have used some form of leave designed to assist with work life balance
- 19.77% of employees utilise flexible work options in a part time, job share, casual or fixed term capacity. A great example of how ingrained the culture of flexibility is, can be seen within our leadership team with a number of senior managers returning from maternity leave and now working part time
- At least 30 employees have undertaken duties from home in some capacity in the last financial year
- Of the 18 women who returned from maternity leave, 14 have returned to a flexible job option
- There was 0% turnover for maternity leavers
- 10 men accessed paternity leave and 40 women accessed maternity leave
- Just under half of the workforce have accessed carers leave
- The new school holiday program, which has operated for two school holidays, has been taken up by 8 employees.

The take up or usage rates of the 'Working Parents' toolkit and the 'Flexible Work Proposal' toolkit is hard to measure as it is available to all employees via our intranet. An increase has been noted in the take up of flexible working options since the programs implementation and overall it can be said that employees are far better educated about their entitlements and options available in the business.

Future Plans

As State Trustees moves toward a new business model, it is expected that more people will look towards flexible work arrangements, as a means to achieve a balanced lifestyle. Our focus in future will be on ingraining a flexible work culture and reviewing the way 'traditional' work tasks/processes are managed.