Outside the March created the following *Flexible Working Models Needs Assessment Template* in 2022 as part of their Balancing Act Level UP! Pilot Project to assess the individual needs and preferences of employees with respect to working arrangements. Employee names have been removed from the document.

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If you have any questions or would like to discuss these materials, please contact Balancing Act at balancingact@theatredirect.ca.

OtM - Balancing Act Level UP!
Flexible Working Models Needs Assessment

	Employee 1	Employee 2	Employee 3	Employee 4
Caregiver?	Yes	Yes	No	Yes
Flexible work accommodations / policies (pre-2021)	- Variable start / end times - Lieu time, unpaid leave - COVID-related remote/hybrid work	- Highly variable hours scheduling - Parental leave (2020-2021)	- COVID-related remote/hybrid work	- COVID-related remote/hybrid work - Highly variable hours scheduling - Unpaid leave
Needs assessment	- Parental leave (2020-2021) - Moved to Ottawa to accommodate family - Some freelance work outside OtM - Values flexibility with lieu time / unpaid leave	- Parental leave 2020-2021 - 3 kids with different schedules - High COVID risk threshold	- Values consistency, clearly-defined workflow - Values in-person work	- Values flexibility for freelance work and caregiving - Values in-person work
Piloted Balancing Act accommodations / policies (2021–2022)	- Long-distance remote work - Financial support for regular travel to attend in-person events / meeting in Toronto - Lieu time - Flexible hours to accommodate variable childcare scheduling - Standardized overtime tracking - BOOST fund pilot	- Highly flexible hours to accommodate childcare - Remote work to accommodate COVID risk threshold - Standardized overtime tracking	- Standardized overtime tracking - Some flexible hours - BOOST fund pilot	- Standardized overtime tracking - Highly flexible hours to accommodate other contracts and caregiver responsibilities
Audit findings	- Long-distance work effective, but remaining questions about whether this is replicable for staff without long history with the company - Flexible hours highly valued as a way of accommodating every-changing childcare needs - Some overreliance on lieu time/overtime to accommodate care needs	- Desire for more consistent parental leave policy - Desire for more clearly-delineated protocols to balance who is working/when - Desires more functional methods for collaborative work based on flexible work models - Passionate about continuing this work and making sure that OtM has a vibrant and caring work culture	- Desires more consistent communication protocols, when "on" and when "off" - Desires pre-planned unpaid leave for travel - Desires more functional methods for collaborative work based on flexible work models	- Desires more functional methods for collaborative work based on flexible work models

	- Regular trips to Toronto very effective for maintaining connection, some questions about how to fund / schedule in future			
Flexible work accommodations/ policies moving forward	- Continued long- distance work - Continued flexible/lieu hours - Continued BOOST fund - Annual care accommodations check-in / audit - Staff-wide adoption of consistent staff workflow protocols / tools (Asana, Google Calendar)	- Continued flexible work / remote hours - Staff-wide adoption of consistent staff workflow protocols/ tools (Asana, Google Calendar)	- Consistent unpaid leave policy - Continued BOOST fund - Annual care accommodations check- in / audit - Staff-wide adoption of consistent staff workflow protocols / tools (Asana, Google Calendar)	- Continued flexible work / remote hours - Staff-wide adoption of consistent staff workflow protocols/tools (Asana, Google Cal)