

# THE WORK-LIFE EVOLUTION STUDY

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# INTRODUCTION

The purpose of The Work-Life Evolution Study is to review the history of the field, examine current trends, and project potential future directions for employers and practitioners in the work-life arena. In this study, we examined the following:

1. How have large companies' workforce management strategies evolved in response to the need for work and family integration over the past 15 years?
2. What are the current and anticipated trends that thought leaders in the work-life field view as important?
3. How will these anticipated trends impact workforce management practices and the focus of the work-life field going forward?

In this report, we will discuss the study's results and how they suggest we shift our thinking about ways to effectively manage people through their career life cycle, thereby yielding positive outcomes for employees, organizations, and society. This undertaking is one of the ways that the Boston College Center for Work & Family is striving to bridge the worlds of research and practice in the work-life field. We would like to thank all who participated in the study either through individual interviews, as part of a group process, or through their financial support.

## The Research Process

The study commenced with a review of journal articles and books on the work-life field and its history. This activity provided a timeline of major milestones in the work-life movement. The next steps in the process emerged through conversations with our extensive network of practitioners and academic thought leaders. Ultimately, we conducted interviews, facilitated large group discussions, and utilized survey results to develop our emergent model for the field. We held discussions with founders of the field, thought leaders, practitioners, researchers and academics, and not-for-profit leaders. The primary data gathering methods and sources included:

1. **Interviews with individuals (HR professionals, academics, and other experts) who are leading practitioners or observers of the field.** A list of interviewees appears in Appendix A.
2. **Reviews of recorded interviews with recipients of the Work Life Legacy Award.** These interviews were conducted by Ellen Galinsky and her organization, The Families and Work Institute. A list of interviewees appears in Appendix A.
3. **Review of the results of a Future Search Conference held at Boston College in July, 2006.** The goal of this conference was to bring together 25 leaders in the field for a two-day discussion of key trends and to begin to develop a vision of the future of workforce management. A list of attendees at the conference appears in Appendix B.
4. **A follow-up survey to validate and prioritize important themes that emerged from the Future Search Conference and the interviews.** We further refined the key themes or trends through a questionnaire distributed to members of the Boston College Work & Family Roundtable, participants from the Future Search Conference, and other leading academics in the field. A copy of the questionnaire appears in Appendix C.

Our report of findings and recommendations does not simply focus on the work-life field. It also frames how the work-life movement has effected more broad-based changes in workforce management over the past 15 years and makes projections for how the movement might continue to grow and develop in the future.

# REVIEW OF THE WORK-LIFE FIELD

## Roots of the Field

The work-life field can trace its roots in two related areas. The first was a focus on childcare programs that were a direct result of the increasing number of professional women entering the workforce in the 1970's and 1980's. The second was an extension of the Employee Assistance Programs (EAP) that were introduced in many companies in the 1970's. Organizations that evolved from a work/family perspective began with a focus on working mothers and the need for quality childcare. Organizations that evolved from an EAP perspective identified the early links between employee stress, depression and illness, and decreased productivity.

There were a number of important milestones for the movement dating back to the 1960's and the early research of scholars such as Lotte Bailyn and Rhona and Robert Rapoport on women's careers and the relationship of work and family. In the 1970's Psychologists Joe Pleck and James Levine began to conduct research on men and their roles in parenting. For many, one of the most influential publications in the evolution of the field was Rosabeth Moss Kanter's *Work and Family in the United States: A Critical Review and Agenda for Research and Policy* that illuminated the "myth of separate worlds" that was prevalent in the thinking on work and family. The 1980's saw the growth of greater corporate involvement in these issues. Exxon funded Catalyst, Inc., a national organization dedicated to the advancement of women in business and professions. Fran Rodgers founded Work/Family Directions to provide child-care support services to IBM in 1983. By the late 1980's Family and Work Institute and the Boston University (later to become Boston College) Center for Work & Family were founded with support from corporate sponsors /members. (Pruitt, Christensen, 2005)

More recently, the focus of work-life has been on workplace flexibility. This was initially in response to the needs of working mothers, but has evolved to accommodate many other populations as well. As Bob Drago of Pennsylvania State University notes in his interview:

*Work-Life is going to be, in some fundamental sense, replaced with something called flexibility. The field literally disappears in the term flexibility. I mean it just took over; because corporations were [wondering] what can we do that doesn't cost us money? And flexibility was the answer. It was always the answer, but I don't think people really understood that.*

## Catalysts That Have Moved the Field Forward

In thinking about the present state and, more importantly, the future direction of the field, it is important to consider what forces helped move the field to its current state. Interviews with thought leaders surfaced a number of significant catalysts. These include: the increase of women in professional roles, media attention, attempts to cultivate corporate image and reputation, feedback / demands from employees, and the emergence of professional groups and consortia.

## Changing Demographics: Rise of professional working women and mothers

The primary catalyst for the work-life movement was in the changing demographics of the workforce. As female professionals and managers began having children, corporations could not ignore the growing challenge these women faced as they struggled with their desire to succeed professionally *and* their desire to have and care for children. As Kathleen Christensen of the Alfred P. Sloan Foundation reflected:

*What drove me in the '80s was this gap between how there was this conventional rendering of the way the world of work was, and then there was this reality of how people were actually living their lives. There was this dissonance, this mismatch between these people, these women; trying to fit themselves into a structure and it didn't work. And, in some cases, they just changed themselves to fit; and other cases, they dropped out, and they dropped out with great cost, in many cases, to themselves.*

This need has continued to be the major factor that draws attention to work and family issues. The balance of work and family (especially in dual career households and in single parent head-of-household families, both of which have risen dramatically in the past 30 years) has driven the need for employers to address this issue.

### The Impact of Media Attention

Without question, the media has played an important role in moving the work-life field forward by drawing public attention to these issues. This theme weaves through all the other catalysts that we explore in this section. Media coverage caught the attention of many CEOs who saw an opportunity to gain media recognition and therefore a competitive edge in the “war for talent.” Professor Lotte Bailyn of MIT recalls the impact the media had on the rapid dissemination of the *MIT Report*, a narrative she had written in the 1990’s on the state of women in science:

*There happened to be a meeting of science journalists at MIT at the time and they asked, “How are women scientists faring?” And so, we said, “We’re just finishing this narrative story.” The Boston Globe person took it and it made front-page news. Then two days later The New York Times had it as front page news, and it started an avalanche of response from all over the country, all over the world. My goal was to get the faculty to know about it; not the world, but [this media attention] just started tremendous change at MIT and elsewhere.*

In our interviews, one of the most compelling successes for the movement that was driven by the media was the advent of the Working Mother Magazine’s “Top 100.” As Bob Drago of Penn State described:

*Maybe the most resounding success in the field was the Working Mother Top 100. I mean just incredible – an incredible success story. Corporations still spend money on it – it takes an estimated four hundred hours to do this application yet many corporations don't blink at spending that kind of money. I mean that's serious money, right, in tight times. But corporations really want to be there. And that has to go to the CEOs. The CEOs have to be saying, okay, this is worthwhile. We're going to do that. (Drago, p 31)*

In recalling the success of the *Working Mother Top 100*, Working Mother Magazine publisher Carol Evans recalled its somewhat humble beginnings but also, the enthusiasm and competition that were generated when the list became “front page news” in the *Wall Street Journal*:

*What happened was that IBM was on the list the first year, and the second year the list hit the front page of the Wall Street Journal. And it was not a big list, but I know IBM was mentioned, Johnson and Johnson was mentioned, and a few other companies were mentioned as second year winners. And that caught the attention of the CEOs. It was being on the front page of the Journal. (Evans, p.8)*

While this level of visibility appeared to be fortuitous, it was also highly intentional. The feeling on the part of key work-life leaders was that if media attention could be garnered, it might stimulate competition among CEOs that would generate action on this important issue.

### **Cultivating Company Image / Reputation**

Closely associated with the media’s attention to this issue was the desire of employers, especially leaders in large organizations, to be viewed as “family friendly.” Companies inherently knew that such media attention would raise their visibility as desirable employers and would allow them to attract top talent, especially among female professionals.

In the mid- to late-1980’s, Faith Wohl, the first Director of Work and Family at DuPont, understood the importance of this and decided to pursue the issue with DuPont, largely leveraging this desire on the part of organizations for positive press. As Wohl recalled:

*There had never been an employee survey within DuPont that had been released to the media... So, we released the first two surveys: one from 1985 and one from 1988. And, all of a sudden, everybody was calling. The media was calling, and other companies were calling, and people within DuPont were calling. The Wall Street Journal had reported it, so it was real.*

DuPont was not alone in their efforts. Other companies began to use their reputation in the field as a way to attract and retain top talent. As Stacey Gibson, Senior Director of Work-Life & Diversity Programs at Bristol-Myers Squibb Company recalled in speaking of the first senior manager to champion the company’s work-life efforts “His expertise was marketing. He started to hear a lot of talk about this whole Work-Family field. And it really struck his marketing bone and just intuitively, he said, ‘This is a way to attract talent.’”

### **Feedback/Demands from Employees**

The voice of employees has also been a major factor in sustaining the movement’s forward momentum. Organizations that have a supportive culture and values that place a high premium on their employees as human beings, not simply as organizational assets or human capital, are likely to see their work-life initiatives as congruent with their culture. As former Johnson & Johnson Chief Executive Ralph Larsen recalled in his Legacy Award interview, “We attract people into our company who believe in the values that we stand for. I can’t tell you how many letters I get from employees who tell us how critical [our work-life programs] have been to their family. So our people recognize that. I don’t think you can separate the company from what we stand for.”

One of the most powerful catalysts to moving the field forward has been employee feedback through internal surveys. As work-life has continued to rise in prominence and importance to employees, surveys have been a highly potent mechanism for getting that message to senior management. While such surveys are virtually always anonymous, the ability to stratify survey feedback by performance band (i.e. what are top performers saying is critical to them) can make the results even more powerful. At IBM where employee surveys and specifically work-life surveys have existed for two decades, the feedback from employees has been one of the strongest drivers of commitment to work-life initiatives. As Maria Ferris of IBM recounts:

*One of the best ideas that we've ever had was to do our work-life surveys, which we've done since 1986 ...It has given us the information to develop programs and policies that help managers and the business understand what's happening, what's changing, how are we doing. The data has provided us with concrete links to how work-life affects retention, how it affects attraction. We can show managers that employees who have better work-life balance tend to be much more committed. They're higher in all of the areas you care about. Across the board, we can show them the hard and fast statistics.*

### Consortium

Developing consortia of organizations and managers has also played an important part in moving the field forward. While individuals worked to establish effective policies and programs within their own organizations, many felt lonely in their efforts. As a result, connections to work-life representatives from other leading organizations helped catalyze action.

By consortia, we mean collaborative efforts that are aimed at:

- Finding others with similar interests and concerns
- Enrolling them in a learning community
- Identifying an organization to facilitate the interchange
- Holding meetings to share information

At first, such efforts were extremely grass-roots. They began as local or regional networks of interested employers and foundations that sponsored conferences or meetings. These early efforts were important in minimizing the isolation felt by people pioneering this important work. After a time, more formal groups emerged with the support of corporate sponsors and in some cases with universities as their home base. As Faith Wohl reflects:

*It was very supportive and unifying ... to talk with other people who were facing the same kind of challenges that you were within their companies. And so I think the field grew up, in the early years, not as a group of competitors, but as a group of collaborators. We were all in it together. We may [have worked] for different companies, but we were out to achieve the same kinds of things. I think only later, it became very competitive and not nearly as much fun as a result.*

Ellen Galinsky, President of Families and Work Institute and head of the Conference Board's Work-Life Leadership Council, echoed the importance of these consortia in catalyzing organizational learning and action, especially in the early days of the movement:

*The thing that was the most important in [making] this a field or a movement was creating the Conference Board Work Life Leadership Council in 1983. Because it brought together those lonely pioneers, individuals from companies who had literally stuck their necks out to try to change the way work was done.*

*And then the Boston College Roundtable was formed. Having a place where companies could get together and learn from each other ... business-to-business sharing with each other was a / the major catalyst for the field. There's no question in my mind.*

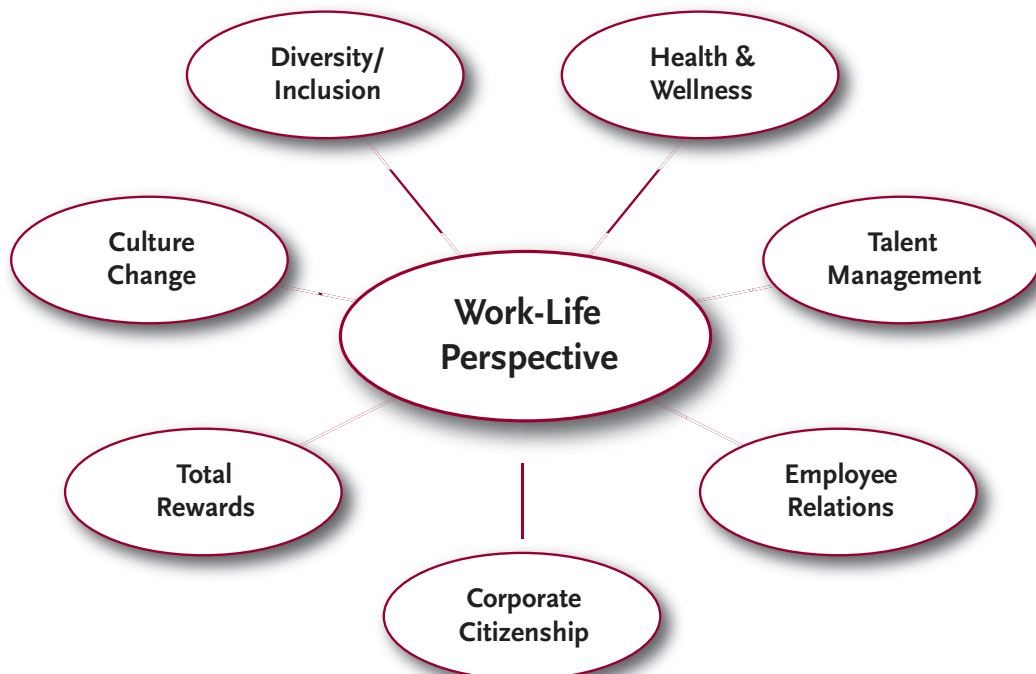
Even today, these consortia continue to play an important role in providing support to their members, stimulating learning, sharing best practices, and providing leadership on key initiatives for the field.

### Work-Life Today

Since the early days of the field when the focus was primarily on dependent care and EAP programs, work-life has expanded to touch on nearly every aspect of a person's working life. Employee recruitment, benefits and total rewards programs, job design, approaches to career advancement and leadership development, employee relocation and travel policies, leave taking, the composition of work teams, corporate social responsibility, and changing corporate culture can all be listed among the myriad of areas that are included under the umbrella of corporate work-life programs.

Correspondently, work-life initiatives are housed in many different areas within human resource departments, depending on the organization's perspective on work-life and the primary focus of their efforts, as the graphic below describes.

### WORK-LIFE PERSPECTIVES



## The Diversity Perspective

As organizations seek to embrace a diverse workforce, create an inclusive workplace, and expand development opportunities for women and minorities, work-life initiatives can be closely coupled with diversity. This is true not only in terms of race and gender, but also with working across the cultural differences that present both great challenges and great opportunities in global organizations. Diversity and inclusion strategies can be broad and can include management and employee training programs, succession planning systems aimed at increasing the representation of under-represented groups in higher level roles, the creation and maintenance of employee networks and affinity groups (e.g. a women's network), and a wide menu of programs and policies crafted to respond to a variety of employee needs and family situations that arise in different cultural contexts.

## The Health and Wellness Perspective

Many organizations see work-life initiatives as a way of extending their employee health and wellness programs. In such organizations, work-life may be most closely associated with Employee Assistance Programs (EAP), health promotion initiatives, or medical programs. Responses will often include a set of programs and policies that consider employees' overall health and psychological well-being through a comprehensive resource and referral service and focused employee wellness programs such as: weight loss classes, fitness centers, smoking cessation and stress reduction programs, and onsite medical services. From the health and wellness perspective, work-life initiatives are also viewed as a means of fostering employee resilience.

## The Talent Management Perspective

Today, one of the most popular catchphrases in human resource management is *talent management*. Talent management encompasses a number of HR functions and attempts to cut across HR's independent silos in order to find, hire, develop and retain the best talent. The functions often included in talent management include HR Planning, Staffing, Performance Management, and Training and Development. Organizations who take this more integrated approach see work-life as an important differentiator in making an organization an "employer of choice." Industries where competition for top talent is particularly acute (e.g. large public accounting firms) are today re-thinking many workforce management practices that have historically made it difficult for working women to develop or even stay with their employer due to work-family conflict. Organizations embracing this approach will take a wider view of the many aspects of work-life discussed above and will look at revising a broad range of HR practices to bring them in line with the needs of today's workforce.

## The Employee Relations Perspective

Employee Relations is dedicated to creating and sustaining a positive work environment by providing special programs to recognize and reward employees' contributions to the organization and helping employees to resolve personal and work-related challenges. From the work-life perspective, Employee Relations offers wellness and family friendly programs designed to maintain and enhance the health and well-being of employees and to make an organization a great place to work. Employee Relations programs can include: employee communications, employee recognition programs, employee assistance programs, job relations counseling, conflict resolution and avoidance, policy interpretation and grievance processing for employees, all of which are related to the integration of work and life.

### **The Corporate Citizenship Perspective**

A small but significant number of organizations have incorporated work-life efforts within their citizenship programs, for several reasons. First, a comprehensive definition of citizenship and corporate social responsibility clearly includes how an employer treats its employees. Second, since most citizenship efforts involve giving either time or money to the community, employee time and volunteerism become a major means by which organizations achieve their citizenship objective. Finally, many employees spend a great deal of time in their personal lives giving back to the community (through mentoring, teaching, coaching, and leadership activities in schools, sports, civic involvement, churches activities, etc.). Work-life programs that provide employees time to give back are a very concrete way to acknowledge that success at work, at home, and in the community are not competing but rather complementary priorities.

### **The Total Rewards Perspective**

Often reporting into Compensation and Benefits under a Total Rewards Perspective, work-life is primarily seen as a major non-monetary component of the total rewards package and a major factor in employee retention. The work-life strategies can be seen as the more “intrinsic” rewards that come from the employees’ work experience in the company. Or, they could focus on a set of organizational policies and benefits that administer flexible employment arrangements or offer tangible benefits such as on-site childcare and concierge services. From the total rewards perspective, work-life initiatives are seen as benefits that facilitate the recruitment and retention of top quality talent.

### **The Cultural Change Perspective**

In many organizations, work-life initiatives are based upon the recognition that the workplace and the workforce are changing and that the organization must create a new culture and seek new ways to get work done. In such organizations, work-life may be most closely associated with organizational development, executive learning, cultural change, and process improvement initiatives. Work-life initiatives may be connected to such concerns as quality of work life, cultural change programs, flexible work arrangements, employee engagement, and reducing workload. Responses within the cultural change perspective will often include initiatives designed to create a flexible work environment where work is measured on outcomes instead of face time, where quality of work-life initiatives (often measured through organizational surveys) can improve business outcomes and employee engagement, and where comprehensive management training programs exist that demonstrate how greater flexibility can lead to improved results for the organization and the individual.

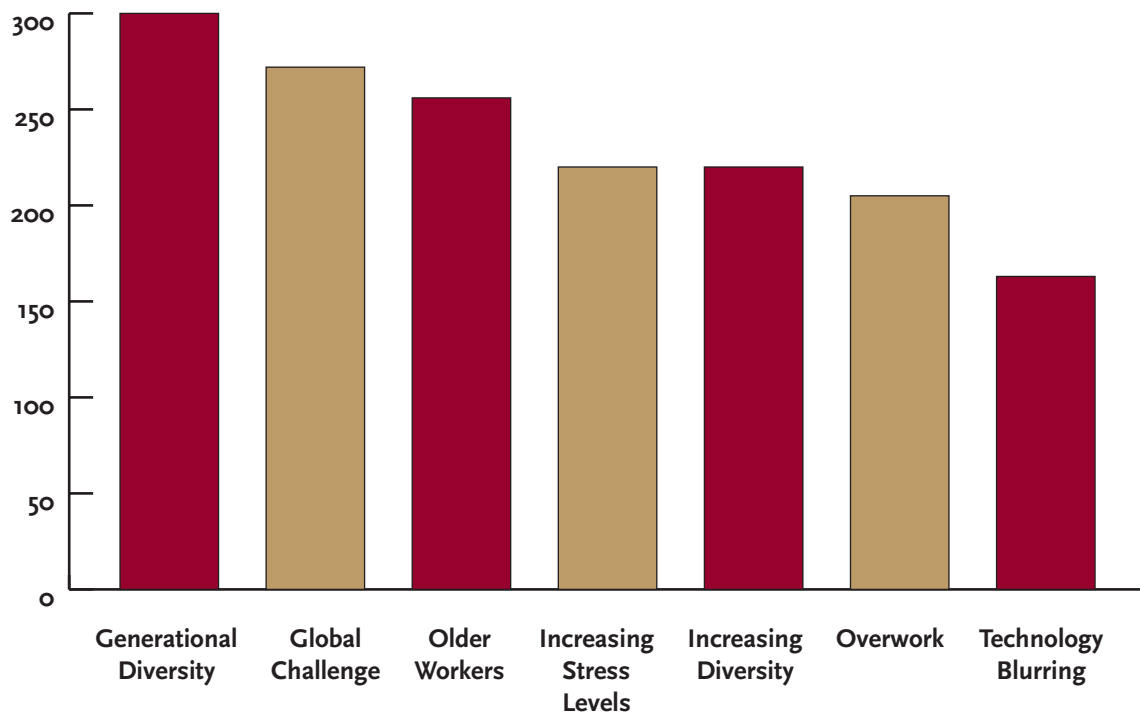
With these many and varied perspectives on work-life, staff dedicated to work-life initiatives in organizations may report to any of a number of different departments within human resource functions. This wide variety of “homes” for organizational work-life responses - policies, strategies, and cultural change programs - can be either a strength or a weakness for the organization’s work-life initiative. On one hand, this divergence may portray work-life as an amorphous function that makes assessing the organizational impact of work-life initiatives challenging. On the other hand, this range of placement options may better connect the organization’s work-life initiatives to a broader set of HR / people management practices and priorities.

Indeed, work-life initiatives today look at the needs of all types of employees, at all levels in the organization, and at all stages of their careers - young, aging, male, female, exempt, non-exempt, and managerial. Clearly, the breadth of the field has changed significantly since its early days and this new, broader lens for viewing the employee as a whole person has impacted organizational approaches to human resource management. Because of the broad range of perspectives and activities that operate under the umbrella of work-life today, this seems a particularly important time to examine the evolution of the field and to try to determine its future direction.

# IMPORTANT TRENDS

From our interviews and the results of the Future Search Conference, we developed a comprehensive list of 33 trends that participants view as impacting organizations and employees. The next step in our research process was to determine which trends were the most compelling in terms of their impact on workforce management generally and work-life specifically. We created a survey in which participants ranked and weighted the identified trends. On this question and in the remainder of the survey, respondents were instructed to use the “\$100 test.” In essence, this task asks participants to imagine they had a \$100 to invest and distribute in any of the following areas, and determine where they would invest their time and resources. (This test is effective in that it selects key areas of focus, rank orders them, and gives a clear sense of the relative importance of each.) All charts following are summaries of the total dollars allocated to each area by the 31 thought leaders who completed the survey. The following chart summarizes which trends our thought leaders feel will have the greatest impact on the field going forward.

## TOP TRENDS THAT WILL IMPACT THE FUTURE OF WORK-LIFE



All scales are based on the results of a survey where participants were given \$100 to allocate to a list of topics for consideration that were developed at the Future Search Conference.

Due to the large number of trends presented, there was some commonality between them. Rather than discuss each trend individually, we have addressed them below in broader categories that encompass a number of individual themes.

**The increase in older workers and the challenge of generational diversity.** The increasing number of

older workers has become an extremely high profile issue, especially in 2006 as early baby boomers reached age 60. The aging of the workforce is a challenge in the United States, but even more so in Western Europe and some Asian countries, notably Japan. Beyond the issue of engaging an aging workforce, the most compelling challenge according to respondents is that posed by generational diversity. (Diversity's focus has clearly moved beyond gender, race and ethnicity.) Challenges in this area include finding ways to address the needs of various age cohorts that reflect their diverse needs at different life stages and helping different generations in the workplace, with their different values and life experiences, work together in the most productive manner.

**Global challenge.** The challenge of working across cultures and countries that has arisen from globalization was identified as the second most important trend. Because work-life integration is defined and treated differently in different cultures and countries (e.g. culturally, legally, philosophically, etc.) this presents an enormous challenge to the HR professional. Another trend that scored highly on the survey was working in a 24/7 environment. This speaks to both the challenges of working globally and also contributes to the issue of heavy workload and excessive work hours (see below.)

**Diversity and inclusion.** Diversity and inclusion are foundational challenges that are major drivers of the work-life field. The trend toward greater diversity in the workforce requires new ways of conceptualizing work and creating inclusive work environments. In addition, many companies are seeing diversity as both a cultural change opportunity and a way to reach increasingly diverse marketplaces both in the US and globally. In this way, diversity can open doors for employees and in turn, clearly support the business case by demonstrating the relationship between diversity and market growth.

**Increasing workloads, work hours, and stress.** Three of the 11 highest scores related to the impact of increasing workload expectations on employees. Organizations have been outsourcing and pursuing a relentless approach to "doing more with less." Globalization has led to longer days and more work hours as has the technology that has enabled employees to work anytime, anywhere as noted below.

**Technology blurring work-life boundaries.** Technology has been viewed as both a blessing and a curse. On one hand, it has greatly expanded opportunities for employees to utilize flexible work options, perhaps most notably telecommuting. As Maria Ferris, Director of Women's Initiatives at IBM points out, "Technology helped people realize that you could work from home, you could work from another location, and the business wasn't going to be adversely impacted." On the other hand, technology can be an intrusion into people's lives. Productivity tools have enabled people to work anytime and anyplace, but have also invaded people's personal lives and turned their homes into "satellite offices," thereby blurring the boundaries between work and home.

Taken together, the trends identified indicate that workplace diversity, globalization, increasing workloads, and pervasive technology form the basis of the most critical challenges that confront employers and therefore the work-life field.

# FUTURE DIRECTIONS AND CHALLENGES

## Shifting from a Focus on Policies and Programs to Culture Change

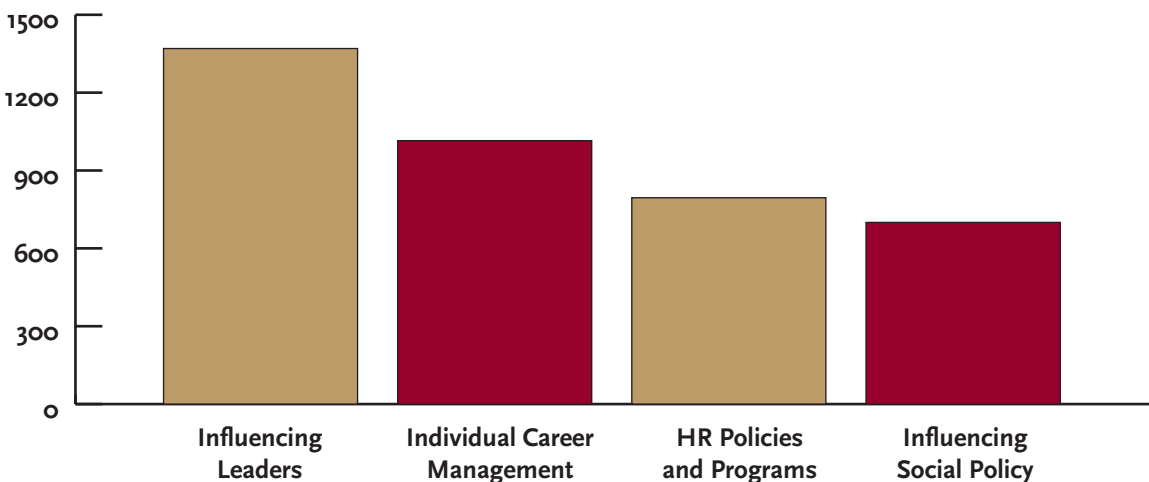
In our review of work-life literature, our interviews, group discussions and our survey, one thing seems certain: any efforts aimed at impacting work-life integration need to be seen as a cultural change process. While the vast majority of HR practitioners and other leaders in the field understand that our efforts have historically focused on HR policies and programs, they believe that this focus has not been adequate to fundamentally alter the way we view work. Simply put, policies and programs are necessary, but not sufficient. One of the early researchers in the field, Rhona Rapoport, of the Institute of Family and Environmental Research, described this well in her interview reflecting on the work that led to her Work-Life Legacy Award:

*I learned how difficult it is to get organizations to change the way they work, even when they say they want to, and how much people are dependent on policies without understanding that the policies, while necessary (it's the same with legislation), are totally insufficient. It's their implementation that makes the difference.*

## Key Areas of Focus for the Future

When asked to prioritize and rate what areas they would focus their energy and time on in order to effect constructive change in the work-life arena, leaders in the field evaluated four options that were developed at the Future Search Conference. As seen in the chart below, these include: influencing leaders; helping individuals make and negotiate good career choices; developing and implementing HR policies and programs; and influencing social policy.

### CRITICAL FOCUS AREAS FOR EFFECTING CULTURAL CHANGE



Participants' prioritization of these areas provided clear insight into how they thought lasting cultural change could be accomplished – **by influencing organizational leaders**. Referring back to Rhona Rapoport's view, while the implementation of policies is important, it can only happen in the context of supportive leadership. Thus far, the emphasis of the work-life field has been more on instituting policies and programs than on encouraging leadership to embrace and even champion the cultural change.

Why is it so important to influence leaders if we seek to change corporate culture? As Professor Edgar Schein, one of the country's leading experts on corporate culture, pointed out in 1988, leadership and organizational culture are so closely connected that it is virtually impossible to treat the two separately. How, according to Schein, do leaders create a culture? They do so primarily through what he refers to as embedding mechanisms. These include, for example:

- What leaders pay attention to, measure, and control
- How leaders react to critical incidents and organizational crisis
- What leaders deliberately role model, teach, and coach
- How leaders allocate rewards
- Criteria leaders use for recruitment, selection, promotion, and firing

Because of their critical roles in organizations, influencing CEOs and line managers is essential if the work-life field is to be successful in impacting workplace cultures. Yet, as we know, influencing this audience is no easy task. Many leaders are skeptical about the impact of work-life programs on their critical business metrics, especially on bottom line financial performance. Perhaps Jack Welch spoke for many when he said in *Winning*, “Bosses know that the work-life policies in the company brochure are mainly for recruiting purposes and that real work-life arrangements are negotiated one on one in the context of a supportive culture.” (Welch and Welch, 2005.)

The difficulty in modifying organizational culture has been well documented in recent years. The question of what we are changing when we change organizational policies is critical. Are we changing the culture, or simply something at a more surface level?

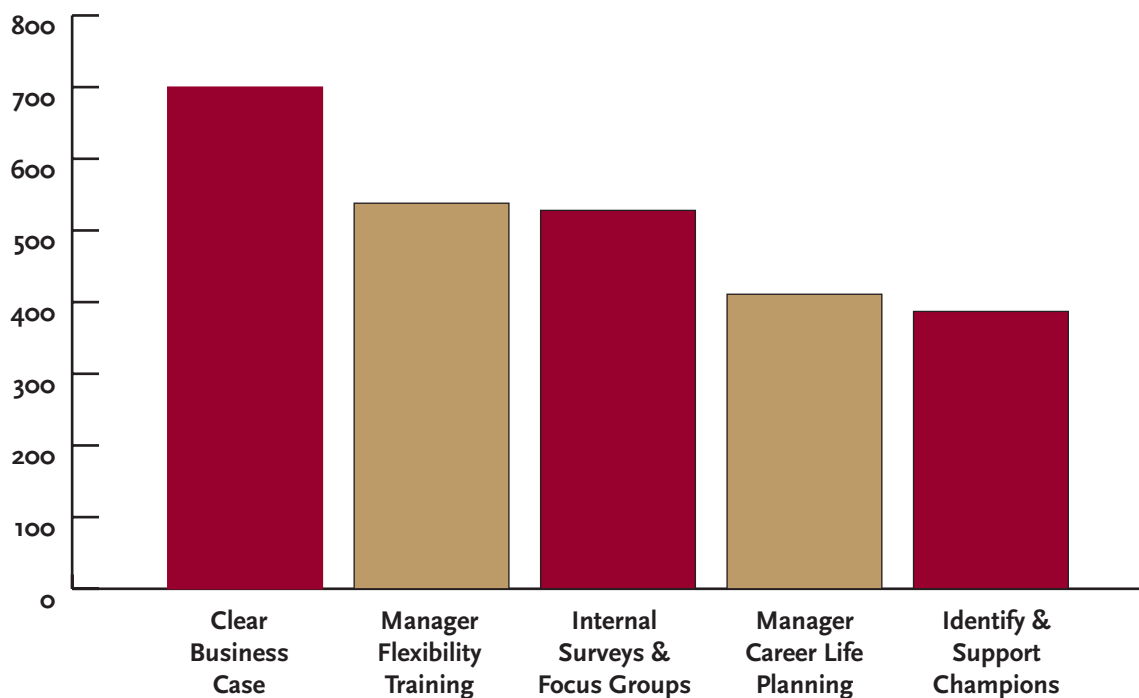
Bringing Schein's ideas to the work-life arena, it is easy to see how these concepts relate directly to the issues we confront. CEOs and other senior leaders will signal clearly through their actions their level of support or lack of support for addressing work-life issues. This signal begins at the top of the organization as Ralph Larsen, former Chairman of Johnson & Johnson pointed out:

*The role of the chief executive officer of any organization is to set the tone at the top. The role of the chief executive officer is to give permission for new thinking. It's not just in the work and family area, but it is also in a wide variety of areas. Certainly, the tone at the top is important. For example, in maintaining the ethical values of the company, 'These are some things we're just not going to do.' And you convey that. You make sure that everybody understands that integrity is critically important and that you will not tolerate anything less. But you can also convey that you have a high regard for, and respect for, the dignity and stability of the family, and you're open to new ideas—as to how we can develop policies and programs, and so forth, that facilitate that. So it's setting the tone, giving permission and encouragement, encouraging people to move in a positive way on this front.*

## Influencing Organizational Leaders

In our survey, work-life leaders were given a list of ways they could impact organizational leaders (line managers and CEOs) and asked again to prioritize. The chart below summarizes their responses to the question, “How can we most effectively influence organizational leaders to create more flexible work organizations and to better align the needs of the organization with those of individual employees?” Respondents prioritized the most effective ways to engage organizational leaders below:

### INFLUENCE ORGANIZATIONAL LEADERS



**Clear Business Case.** For respondents, the most important factor in influencing line managers was to “make the business case for work-life clear for business leaders.” While this has been attempted in the past with varying degrees of success, respondents felt more needed to be done through providing data, research results, and anecdotal evidence that supports the notion that work-life integration makes business sense.

**Manager Flexibility Training.** Because this movement represents a significant cultural change for most employers, we must assume that most managers are not familiar with or skilled at managing employees who are utilizing (or requesting to utilize) flexible work approaches. As a result, managers may find themselves in unfamiliar territory as they negotiate and construct flexible arrangements with their employees unless they are given adequate training to do so.

**Internal Surveys and Focus Groups.** In the section on catalysts that moved the field forward, we dis-

cussed the importance of employee feedback. Respondents felt this is still a particularly important method for determining and communicating employees' needs and desires to leaders regarding work-life issues. This information is critical to helping organizations understand how to engage and retain top talent.

**Manager Career-Life Planning.** Helping managers make a personal connection to issues around work-life integration may be critical in changing their mindsets on this subject. One of the strengths of the field is perhaps in its universality (i.e. virtually everyone can connect to work-life challenges regardless of their gender, race, age, salary, or level in the organization.) A key to impacting managers is to have them attend training where they can reflect upon and address their own career-life challenges.

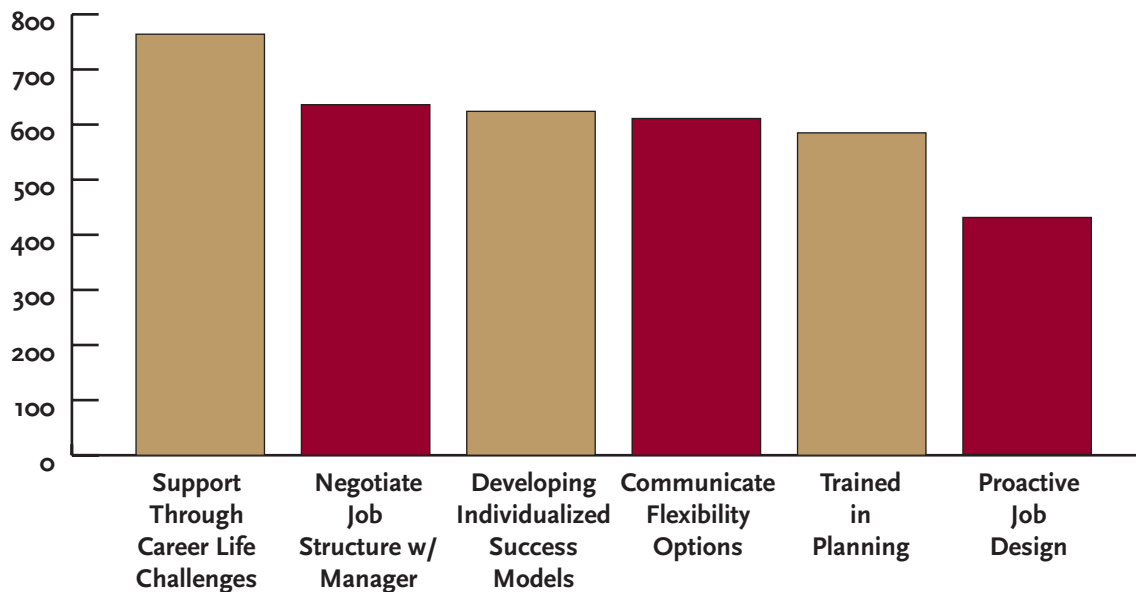
**Identify and Support Champions.** There are often line managers who are willing to pioneer flexible arrangements and non-traditional approaches to work either themselves or with their employees. Working with these managers, supporting their pioneering efforts, and sharing their success stories will help to build the case for work-life integration. In addition, line managers have more direct impact than HR professionals to create flexible work arrangements that impact both business results and the level of employee engagement. As one CEO said:

*It's two levels, and you can't separate them: the boss and the organization. If you have a dinosaur of a boss, that's a big problem no matter what the organization wants to do. We need sensitive leaders, leaders in our business organizations that are sensitive to these matters, who understand that a good family life, a solid family life, a sound family is important to the productivity, to the creativity of the individual. To be able to develop and give all that they're capable of giving, that's a good thing from a business point of view.*

## Individual Career Management

When surveyed, respondents asserted that after influencing leaders, helping individuals proactively manage their career and work-life options is the next important area for the field to focus on. Once again, respondents were asked to rate the ways they could best spend their time to foster individual career management.

### INDIVIDUAL CAREER MANAGEMENT / HELP INDIVIDUAL MAKE CAREER CHOICES



Results from the survey indicate that providing support to employees in the following ways would be most beneficial:

***Provide individuals with support in working through difficult career-life challenges and decisions.*** This could come in the form of providing career-life coaching as well as resource and referral programs to external sources and service providers.

***Train and encourage individuals to work with their managers to negotiate optimal job structure and discuss their career aspirations.*** This second priority reinforces the critical role that managers play in making the work-life agenda effective. Organizational policies and programs create the perception that an organization supports employees in their efforts to achieve work-life integration. As has been noted however, managers (at all levels) are an important link to ensuring that the organization “practices what it preaches.” Since managers play this role, it is critical that individual employees be skilled at working with their own managers to develop win-win solutions.

Carol Evans, CEO of Working Mother Media, would agree that this is an area of importance and one that may not have received adequate attention from work-life professionals up to this point.

*Individual career choice is a really important area that I think the work-life industry needs to focus on more. Helping people find the right solution, helping people do what I call straight talk, you know really talking to their individual manager honestly. [This is where] I see the pain. If I interviewed ten women about their work-life situations, five of them will feel that they work for a company that is good, but that there is a disconnect to their own life somehow - big companies, small companies, good companies, on the list companies. It doesn't matter. So individual career choices, I think everybody needs to do a better job at.*

**Develop organizational success models that allow for individual differences in terms of what constitutes success and communicating them to all employees.** Too many organizations give credence to a very narrow and stereotypical view of career development and success. The respondents indicated that new models of what constitutes contribution and a successful career need to be embraced by individuals and organizations and these need to be widely communicated as appropriate and desirable. The narrow view that upward promotions are the only path to success suggests that those who opt for non-traditional work schedules or alternative career paths are not going to be successful. As one work-life director from a highly regarded employer stated:

*We've created a really good culture [but] we have a long way to go in terms of helping individual employees understand how to really make choices. I don't think we have the courage to have open and honest conversations. I also don't think that we've had good discussions in corporate America in terms of what success is for each of us. We still have the paradigm of continuing to look up.*

**Ensure that individuals are well versed in and understand their employers' flexible work arrangements.** This priority places responsibilities on both the individual and the organization. From the organization's perspective, it is important to not only have flexible work arrangements but also to communicate their availability to employees. This will allow individuals to better understand their options and hopefully where appropriate, to more readily use them.

**Train employees in career management and planning techniques.** As we have moved away from more traditional careers and rigid hierarchies, it is important that individuals be trained on how to establish clear priorities, develop a career plan, and discuss this with their manager to ensure positive outcomes for both the individual and the organization. This shift toward what Douglas T. Hall (2007) has labeled the "Protean Career" requires that individuals not look to organizations to develop their career strategies. Rather, individuals should be skilled at and take ownership for defining their own career objectives and determining their own path to success.

## HR Policies and Programs

While HR policies and programs were rated third among the key focus areas, this should not be taken as a sign that these are unimportant, especially in large organizations. Policies and programs have been and will continue to be an essential component of the work-life field. Interviews suggested that HR policies are important for many reasons including:

- They provide guidance to managers on how to implement work-life programs and flexible work arrangements.
- They help to ensure equity across levels and departments. Effective policies ensure that employees who may feel more vulnerable or at risk are afforded the same opportunities that other in preferred positions enjoy.
- They ensure a level of consistency of implementation.
- They can help to institutionalize cultural change.

## Influencing Social Policy

Influencing social policy, whether at the local, state, or national level has often presented a challenge for work-life professionals. That said, partnerships with other internal functions such as community relations and government relations as well as with external parties including government agencies, schools, health-care providers and other not-for-profit organizations can have a great impact on addressing the needs of employees. A key theme in this area is to foster public-private partnerships to solve problems that transcend any one employer. These partnerships could focus on issues such as convening a summit to study the relationship between work-life practices and positive health outcomes, developing a strategy to address the need for universal health care, and developing a national media campaign on the importance of work-life integration.

## IMPLICATIONS FOR THE FIELD

Most work-life programs today are still owned and championed by the HR function, and a much greater emphasis on strategies that more fully engage senior organization leaders, line managers and individual employees will be necessary to move the field forward. The goal is to reach the stage where HR, line management, and individual employees have a “shared vision” for an integrated and consistent approach for managing work-life issues. At that point, organizations will truly have an aligned approach to workforce management based on a philosophy that respects and supports the “whole person.”

What is the message for those working in the field moving forward? What skills and abilities will be required if we are to move in the directions described in this report? According to our respondents, the implications for skill development for the field include the following:

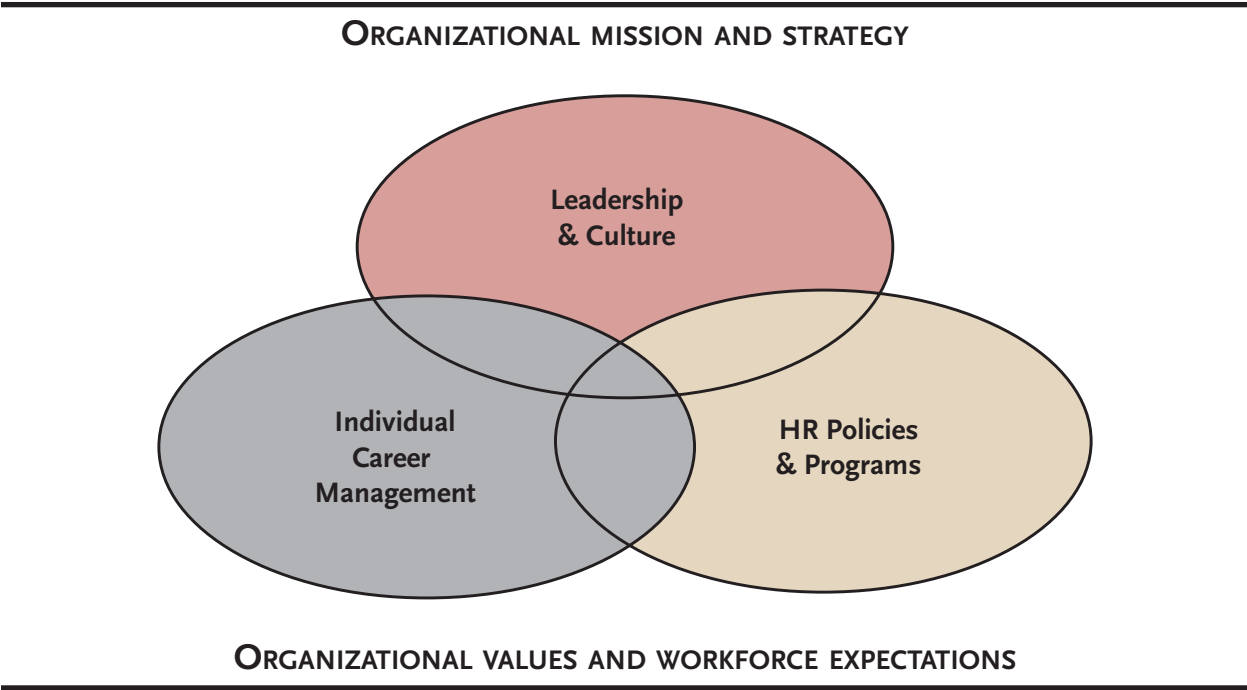
1. **Change management expertise.** This study’s outcomes make one point clear: if you are working in the work-life arena you are in the organizational change business. There are well established models, skills and competencies for managing cultural change. Members of the work-life field need to develop these skills to be successful.
2. **Consulting skills.** Consulting with and educating managers on the importance of flexible approaches and how to use them will be increasingly important for the field. As professionals move from managing specific programs to helping broker broad-based workplace solutions, the ability to educate and coach managers on how to use innovative work-life practices will be critical.
3. **Ability to demonstrate how innovative workforce practices lead to positive organizational outcomes.** Respondents believe that work-life and flexibility still face skepticism in terms of their impact on the bottom-line. Until this case can be made, the field will struggle to gain widespread management commitment.
4. **Training employees in the skills necessary to make appropriate career choices.** If we believe that individuals ultimately own the responsibility for their own careers, it is important to provide them with the necessary training to do so effectively. This education could include helping individuals develop a clearer sense of their own identity and priorities as well as developing a better understanding of the organization’s career development and work-life practices.
5. **Understanding how work-life perspectives can be incorporated into a broad range of workforce management practices.** At the outset of this report, we discussed the breadth of the field and the impact work-life has on virtually every aspect of an organization’s workforce management practices. Given this, a critical skill for work-life practitioners will be partnering with other HR functions to incorporate a work-life perspective into all HR offerings.

# RECOMMENDATIONS

## Toward an Integrated Approach to Workforce Management

Based on the findings of the Evolution Study, we have developed a number of recommendations for moving the work-life field forward. The Center for Work & Family has developed the *Organizational Effectiveness Model* to describe the three key parties needed to achieve organizational alignment in work-life and workforce management: leadership, human resources, and individuals. Each of these three parties carries an important responsibility for creating an integrated and aligned approach to achieving an appropriate and effective organizational culture. Such a culture should meet the needs of contemporary organizations and today’s multi-generational, global workforce.

We see this model as a way of emphasizing the areas in need of attention and as a way of denoting that the areas must work in synergy in order to be most effective.



**Leadership:** As we have stated, leaders (from top management to first line supervisors) play a crucial role in developing and sustaining an effective organizational culture. In order to create a culture that is responsive to employees’ work-life needs, change initiatives must be led by senior managers who have a clear vision of the desired end-state. Based on employee surveys, benchmarking, and external research, the human resource function can and should make recommendations to leaders about the needs of the workforce. It is ultimately the role of line managers, however, to determine and then create the organizational culture that best supports the achievement of the organization’s aims and the organization’s values.

In order to be effective, leaders must view their attempt to create a more responsive and inclusive work-life culture as an organizational change effort. (This means understanding that doing things the same old way will not yield a different outcome.) Leaders must have a clear vision of the desired future

state for their organization, a mobilization strategy that drives accountability through all levels of the organization, and the means to measure organizational outcomes. As our study revealed, the pioneers and practitioners in the work-life field see leadership as *the* most critical element in creating effective workplaces.

**Human Resources:** The human resources function also plays a critical role in developing an effective and inclusive workplace. First, HR should be well grounded in the business strategy, labor market trends, and employees' changing needs. In addition, they should have a good understanding of what leading organizations have done to create the most effective workplaces. HR should then create appropriate policies and programs across a wide range of HR activities (e.g. staffing, diversity, total rewards, training, health and wellness) that help the organization achieve its aims through sound talent management programs.

HR must also emphasize through training, communications, and performance management systems that reinforce that new ways of working and managing careers are the wave of the future. These efforts will ensure that people are treated equitably, that employees are aware of how to access needed support, and that organizations can benchmark best practices in workforce management in order to maintain the top talent.

**Individual Employees:** Employees must take greater responsibility for effectively and proactively managing their own careers. With the right training and policies from the HR function and support from an aligned management team, individuals should take ownership for a number of key things. First, they should take ownership for establishing their own work-life priorities. Second, they should then initiate conversations with their manager to discuss ways that the individual can achieve both organizational and individual objectives. Third, through structured reflection, on-going monitoring, and communication, they need to maintain their careers in ways that are mutually beneficial to both themselves and their employers.

## Summary

There are two important things to keep in mind. First, these efforts should be aimed at achieving the goals of the organization. Second, the workforce management program should reflect the values of the organization and the needs of its workforce. Programs that are not supporting these aims will be seen as irrelevant or worse, counter-productive.

Finally, it is critical that these three groups not only carry out their individual roles effectively but work together in an integrated manner. Disconnects between the three groups could lead to problems that will undermine the effectiveness of these efforts. For example, if HR launches programs that are not driven by and fully supported by leaders, the programs will lack credibility in the eyes of organizational members. If policies are instituted but are not well communicated, employees will be unaware of them and they will suffer from poor utilization. If employees are not clear on their own career-life priorities, they will not be in a position to discuss with their manager ways to develop more appropriate work-life solutions that will meet both their professional and personal needs. Finally, if managers are not trained in how to manage in the new environment, they will likely be unprepared for dealing with and effectively supporting individual or workgroup needs.

What is needed is an integrated and aligned approach to this corporate change strategy. All players in the organization need to be well versed in their roles and well connected with one another to turn this vision into a reality.

# CONCLUSIONS

The Work-Life Evolution Study was intended to help the field better understand where it has been and where it needs to go. Its goal was to define the critical areas of focus for the field and outline the skills essential to moving these initiatives forward. Three key conclusions can be drawn from this study:

1. Tremendous progress has been made in implementing innovative work-life policies and programs over the past 20 years, especially in leading companies. However, we still have a significant challenge if we are to institutionalize this new way of working and managing the workforce. This will require viewing work-life as a cultural change endeavor to a much greater degree than is the case today.
2. The critical areas of focus in making the transition to a cultural change perspective are influencing senior leaders and line managers and helping employees make and negotiate effective career choices. This will mean clearly moving responsibility for implementation of work-life initiatives from staff (i.e. Human Resources) to line functions.
3. The role of the work-life professional will shift from that of a specialist managing work-life programs to that of a cultural change agent. This will require building skills in organization development and in facilitating cultural change efforts, often in large and complex organizations.

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# APPENDIX A

## List of Interviewees Participating in the Study

Anne Andreosatos, Diversity Director, Proctor & Gamble

Lotte Bailyn, Professor and Co- Director of the Center for Workplace Solutions, Massachusetts Institute of Technology\*

Joy Bunson, Former Sr. Vice President, Organization Development, JP Morgan Chase\*

Kathleen Christensen, Work-Family Program Director, Alfred P. Sloan Foundation\*

Robert Drago, Professor of Industrial Relations, The Pennsylvania State University

Carol Evans, President and CEO, Working Mother Media

Maria Ferris, Director of Women's Initiatives, IBM Corporation

Ellen Galinsky, President, Families and Work Institute

Stacey Gibson, Senior Director of Work-Life & Diversity Programs, Bristol-Myers Squibb Company

Ralph Larsen, Former Chairman, Johnson & Johnson\*

Shelley MacDermid, Professor and Director of the Center on Families, Purdue University\*

Marcie Pitt-Catsouphes, Professor, Director, Boston College Center on Work and Aging

Rhona Rapoport, Director, Institute of Family and Environmental Research\*

Francene Rodgers, Chairperson, WFD Consulting\*

Faith Wohl, Former Work-Life Director, DuPont\*

\* Indicates the interview was conducted by the Families and Work Institute as part of the Work-Life Legacy Award process

# APPENDIX B

## Attendees at the Future Search Conference

### Boston College

July 18 & 19, 2006

- Bill Albright, Vice President of Benefits, MITRE Corporation
- Ann Andreosatos, Director of Diversity, Proctor & Gamble
- Lois Backon, Vice President, Families and Work Institute
- Lotte Bailyn, Professor, MIT Sloan School of Management
- Sandy Burud, Research Professor, Claremont McKenna University
- Kay Campbell, Manager, Global Health and Productivity, GlaxoSmithKline
- Judi Casey, Director, Sloan Work and Family Research Network
- Jessica DeGroot, President, Third Path Institute
- Laura den Dulk, Researcher and Professor, Utrecht University
- Joyce Fletcher, Professor, Simmons Graduate School of Management
- Mindy Fried, Principal, Arbor Consulting Partners
- John Hamilton, Vice President of Business Excellence, Philips Medical Systems
- Brad Harrington, Research Professor and Executive Director, Boston College Center for Work & Family
- Peggy Henderson-Divers, Program Manager Work/Life, Flexibility, & Mobility IBM Corporation
- Jackie James, Research Professor and Director of Research, Boston College Center for Work & Family
- Kathy Kacher, President, Career-Life Alliance
- Donna Klein, President and CEO, Corporate Voices for Working Families
- Candi Lange, Former Director of Workforce Effectiveness, Eli Lilly and Company
- Peter Linkow, President and CEO, WFD Consulting
- Kathy Lynch, Director of Corporate Partnerships, Boston College Center for Work & Family
- Kathie Lingle, President, Alliance for Work Life Progress
- Andi Moselle, Senior Manager, Work/Life, AstraZeneca
- Karen Shine, Vice President, Employee Benefits, Digitas, Inc.
- Erin Sullivan, Work-Life Manager, Fidelity Investments

# APPENDIX C

## Work-Life Evolution Study Analysis and Weighting of Findings

You have \$100 dollars to invest in the issues in each section listed below. You can choose to invest in any increment you would like. This exercise is useful because it establishes what you view as a priority, it ranks items in terms of their importance to you, and it weights the issues relative to the others listed.

### Section I. Present & Future Trends that Will Have the Greatest Impact on the Workforce Management / the Work Life Field

#### 1. Globalization

- Working in a 24/7 environment
- Increased dispersion of workforce/colleagues, working virtually
- The rise of China and India's economy
- The impact of globalization on job loss in the US
- The challenge of working across cultures and countries

#### 2. Mergers/acquisitions/downsizing

- Their impact on organizational change and instability
- Challenge of managing in large, complex organizations
- The impact of mergers on job loss / downsizing

#### 3. Worker Demographic Shifts

- Older workers (how to work with, engage, & develop them)
- Talent shortage resulting from retiring baby-boomers
- Generational Diversity
- Dealing with younger workers (Gen X and Gen Y)
- Increasing number of immigrants entering the workforce

#### 4. Importance of Diversity

- Increasing diversity creates needs for inclusive workplace

#### 5. Changes in Technology

- Technology-blurring of work/family ("anywhere-anytime workplace" becoming "everywhere, all the time")
- Technology changing the nature of work (from manufacturing work to knowledge work)

#### 6. Changing Gender Roles

- Increasing % of fathers engaged in active / co-parenting
- Increasing number of women in management and senior management positions

## 7. Increasing Workload

- Increasing work hours
- Overwork – pressure on old models for working
- Stress levels increasing causing poor performance and/or leading to poor health outcomes for employees

## 8. Growing Inequalities

- Growing disparity between in income levels
- Increasing number of low income workers

## 9. Changes in Employment Contract

- Change in employer/employee relationship (greater feelings of vulnerability for workers)
- Changes in employee benefits toward self-reliance
- Values shift from communal to individual

## 10. Changing Career Patterns and Expectations

- More self-directed careers
- More changes in careers over the lifespan/ more idiosyncratic
- Greater desire for people to find more meaning in their work and their lives

## 11. Increasing Healthcare Costs/Availability

- Rising healthcare costs transferred to employee leads to backlash
- Rising healthcare costs forcing people to work longer
- Rising healthcare costs lead organizations to promote balanced lives and health & well being

## 12. Increasing Importance of Work-Life Balance

- People willing to take less pay to spend more time with family or not working
- Dual-centric, those < 30s refusing promotions more frequently to maintain balance

**Section II. Catalysts to Move the Field Forward**

- Messages from the Media
- Cultivating company image through awards (e.g. Working Mother, Sloan Awards, etc.)
- Working with Consortiums (e.g. organizations such as the W & F Roundtable, the Conference Board Work-Life Leadership Council, etc.)
- Research that demonstrate the effectiveness of work-life programs for the company and the employee
- Government policies that support working people and their families (e.g. FMLA, universal health coverage, etc.)

### Section III. Critical areas for Work-Life Focus in the Future

- \_\_\_\_\_ HR Policies and Programs: Developing effective policies and programs (internally or with the support of vendors and consultants) that address the broad range of issues covered under the work-life umbrella
- \_\_\_\_\_ Influencing Organizational Leaders: Working in a consultative manner with leaders at all levels of the organization to ensure that effective work-life management practices are incorporated into the organization's values, culture, and management behaviors.
- \_\_\_\_\_ Helping Individuals Make & Negotiate Good Career Choices: Providing individual employees with the training, consulting, and organizational support to make good choices and effectively and pro-actively manage their career and work-life options
- \_\_\_\_\_ Influencing Social Policy / Policy Makers: Working with external bodies (e.g. professional organizations, associations, and government representatives) to ensure that employees' needs are supported through effective legislation and social policy

### Section IV. Influencing Organizational Leaders

- \_\_\_\_\_ Make the business case for work-life clear to organizational leaders (i.e. through data, research results, anecdotal evidence)
- \_\_\_\_\_ Identify and support pioneer leaders and enlist them in making the case for change with their peers
- \_\_\_\_\_ Find ways to get CEO's and other senior leaders to benchmark leaders in other progressive organizations
- \_\_\_\_\_ Embed this issue (Work-Life, effective career management) in MBA programs
- \_\_\_\_\_ Have all managers participate in training on career / life planning (for their own use as well as to coach their subordinates more effectively)
- \_\_\_\_\_ Train all managers on the importance and how to use flexible management approaches (training could include panels of employees / working parents)
- \_\_\_\_\_ Use internal surveys and focus groups to demonstrate the importance of work-life in retaining the best talent (be able to stratify survey results by performance levels)
- \_\_\_\_\_ Document and develop cases of highly effective dual-centric leaders
- \_\_\_\_\_ Help managers understand that equitable treatment is not the same as treating everyone the same

### Section V. Help Individuals Make Effective Career Choices

- \_\_\_\_\_ Individuals are trained in career planning and decision making
- \_\_\_\_\_ Individuals become more proactive in designing jobs that are customized and fit their needs and those of their employer
- \_\_\_\_\_ Individuals are "well versed" in and understand their employers flexible work arrangements thanks to broad and effective organizational communications strategies
- \_\_\_\_\_ Individuals are trained and encouraged to work with their manager to negotiate optimal job structure and career progression
- \_\_\_\_\_ Organizational "success models" that allow for individual differences in terms of what constitutes success are communicated to all employees
- \_\_\_\_\_ Individuals are provided with support in working through difficult career-life challenges and decisions (e.g. career-life coaching, resource and referral programs, etc.)

**Section VI. Social Policy and Policy Makers**

- \_\_\_ Foster public private partnerships to solve important problems that transcend any one employer (e.g. Massachusetts Work-Family Council)
- \_\_\_ Develop a “straw man” for an employee “Bill of Rights” (i.e. all workers are entitled to health-care, livable minimum wage, etc.)
- \_\_\_ Develop solutions to ensure universal health coverage
- \_\_\_ Bring interested parties together to develop a media campaign on the importance of work-life for everyone
- \_\_\_ Support studies of low income / contingency workers to highlight their need for work-life support
- \_\_\_ Ensure more education is available to students to help them understand how to manage work-life integration issues and how to deal with them effectively
- \_\_\_ Convene a summit for healthcare and HR professionals to discuss the relationship between effective workforce management / work-life practices and positive health outcomes

**Section VII. Critical Skills for the Field in the Future**

- \_\_\_ Understanding of broad range of Work-Life programs that can be used to support your workforce
- \_\_\_ Understanding and ability to effectively manage Work-Life vendors
- \_\_\_ Understanding how a “Work-Life perspective” can be incorporated into a broad range of human resource and workforce management practices (e.g. diversity, health & wellness, total rewards, leadership development, etc.)
- \_\_\_ Knowledge of research and understanding how to utilize it to focus and support innovative workforce management practices.
- \_\_\_ Expertise in change management
- \_\_\_ Expertise in influencing / educating managers on the importance, and how and when to utilize flexible work approaches
- \_\_\_ Ability to provide training and assistance employees to make good career choices that support both professional and personal “success”
- \_\_\_ Ability to work with external constituents, including local, state, and federal government to influence policy decisions
- \_\_\_ Ability to measure and demonstrate how innovative workforce management practices lead to positive organizational outcomes





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