



EMPLOYEE AND LABOR RELATIONS
STUDENT WORKBOOK

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Case Study Series on Work-Life
Balance in Large Organizations

By Gill Maxwell

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Case Study Series on Work-Life Balance in Large Organizations

By Gill Maxwell

Student Workbook

Employee and Labor Relations

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Overview

Introduction

Changing demographics in the labor force in the U.S. and in other developed countries such as the United Kingdom (U.K.), together with a recruiting crunch in some organizations, have encouraged an increasing number of employers to consider the work-life balance of their employees. At the same time, recognition of work-family disconnects, especially for working mothers, is growing. Organizations are responding by introducing flexible work arrangements.

This case study series explores work-life balance and flexible work arrangements. Each case highlights the conditions and requirements necessary to make work-life programs and practices successful. Developed for an undergraduate audience, these case studies explore five different flexible work arrangements in five different organizations located (but not necessarily headquartered) in Scotland in the U.K.:

- Organizational culture and working hours in W.L. Gore & Associates, Inc.
- Job sharing in Motorola.
- Health promotion in IKEA.
- Emergency leave and the employee assistance program in the Scottish Court Service.
- Career Breaks in Lothian and Borders Police Service.

W.L. Gore, Motorola and IKEA are privately owned, while the Scottish Court Service and the Lothian and Borders Police Service are state-funded, public service organizations. The private-sector organizations are international and the public-sector organizations are nationwide. Large private-sector organizations tend to have the resources to develop new human resource initiatives, while public-sector organizations in the U.K. have a general duty to develop leading human resources practices. As a result, these organizations are leaders of work-life balance in practice.

These are real-life case studies that demonstrate a range of work-life balance initiatives. The information for each case was obtained from three key informant interviews in each organization. The interviews were conducted with a senior human resource specialist, usually a director; an employee or employees who had (at the time of the interviews) recent experience of the particular work-life balance arrangement in the case; and the line manager of the employee(s) featured in the case study. The case method, therefore, is qualitative and relative: each case is a snapshot in time to reflect the reality of organizational life from the interviewees' viewpoint.

Format

Each case provides background information about the organization; the particular work-life balance arrangement being highlighted; the outcomes of using the arrangement; the future of the arrangement in the organization; and learning points. The company's Web site address is provided in each case, should you wish to seek more general information about the organization. Discussion questions are included at the end of each case study. Your instructor will either assign small groups of students to discuss, or use for a plenary class discussion.

Learning Objectives

You will:

1. Understand the innovative nature of work-life balance programs in organizations.
2. Develop insights into the issues in and management of work-life programs.
3. Assess organizational approaches to work-life balance programs in an international context, drawing comparisons with those in the U.S.
4. Make wider inferences from the collective case studies to develop employer guidance on best practices in work-life balance.

Key Words

Work-life balance, flexible work, employees, employers and line managers.

Recommended Readings

Bianchi, S.M., Casper, L.M., and King, R.B. (2005). *Work, Family, Health and Well-being*. Mahwah, New Jersey: Lawrence Erlbaum.

Essentially a reference book, this textbook provides statistics and research summaries on different aspects of WLB including government policies, flexible work arrangements and international comparisons.

Ernst-Kossek, E., and Lambert, S.J. (eds.) (2005). *Work and Life Integration: Organizational, Cultural and Individual Perspectives*. London, UK: Lawrence Erlbaum.

This interdisciplinary textbook covers work-life intersections at varying levels of analysis, including gender, and offers policy implications and suggestions with contributions from multiple authors.

Pitt-Catsoupes, M., Ernst-Kossek, E., and Sweet, S. (eds.) (2005). *The Work and Family Handbook: Multidisciplinary Perspectives, Methods, and Approaches*. London, UK: Lawrence Erlbaum.

This textbook reviews a wide range of perspectives—including HRM, organizational behavior and business—on the study of work-family relationships, theory and methods.

Suggested Reading

Hyman, J., and Summers, J. (2004). Lacking balance? Work-life employment practices in the modern economy. *Personnel Review*, 33, 4, 418-429.

Maxwell, G. (2005). Checks and Balances: Manager Responsibility for Work-life Balance in the UK Service Sector. *Journal of Retailing and Consumer Services*, 12, 3, 179-189.

Maxwell, G., and McDougall, M. (2004). Work-life Balance: Exploring the connections between levels of influence in the UK Public Sector. *Public Management Review*, 6, 3, 377-393.

Maxwell, G., Rankine, S., Bell, S., and MacVicar, A. (2007). The Incidence and Impact of Flexible Working Arrangements in Smaller Businesses. *Employee Relations*, 27, 2, 138-161.

Case Study One

Organizational Culture and Working Hours at W.L. Gore & Associates, Inc.

Background

W.L. Gore & Associates, Inc. is a global, privately held company headquartered in Newark, Delaware. It employs approximately 8,000 employees (called associates) in more than 45 locations worldwide. Founded by a husband-and-wife team in 1958, its manufacturing operations are clustered in the U.S., Germany, Japan, China and Scotland. There are three sites in Scotland, two in Livingston and one in Dundee, employing approximately 450 people. Gore produces proprietary technologies with versatile polymer polytetrafluoroethylene (PTFE) used in products in the health care and leisure industries. It is especially known for products like GORE-TEX® and ELIXIR strings. Gore is known not just for its innovative products, but also for its innovative business style (Gore's written business objective is "To make money and have fun"). Gore strives to create a unique corporate culture. Quite simply, the culture is driven, according to co-founder Bill Gore, from the need to "foster the creativity and initiative that contribute to technical development."

Corporate Culture and Working Hours

The organizational culture is founded on a team-based environment where teams are organized around opportunities and leaders emerge. Teams are fluid and comprise followers and leaders. Employees, known as associates, have no defined job titles, only general task/responsibility areas. Leaders emerge naturally by demonstrating special knowledge, a skill and/or experience that will move the business objective forward. According to Ann Gillies, an associate in the HR team in Scotland, leaders are defined not by organizational status but by 'followership' because of "personal influence, not power". The roles of leaders and followers are interchangeable by work projects.

All associates have a sponsor, or mentor, assigned to guide them to "chart a course in the organization that will offer personal fulfillment while maximizing their contribution to the enterprise." In this way, associates can alternately—and simultaneously—be leader, follower and sponsor.

Enabling this corporate culture of teamwork is a commitment to four basic principles (as espoused by Bill Gore) that drive the organization's activities:

- **Fairness** to each other and everyone with whom they come into contact.
- **Freedom** to encourage, help and allow other associates grow in knowledge, skill and scope of responsibility.
- The ability to make one's own **commitments** and keep them.
- Consultation with other associates before undertaking actions that could affect the reputation of the company by hitting it "**below the waterline.**"

It is the corporate culture based on the four fundamental principles that integrates and enables work-life balance at W.L. Gore. Gillies believes Gore operates fairly and that associates are not managed but instead manage themselves by being fair, meeting commitments and consulting others as appropriate. Consequently there are very few company policies, procedures or rules; practices develop naturally and do not need to be framed in policies. There are no policies and procedures, therefore, that explicitly relate to work-life balance. However, the company's approach to work-life balance can be seen in its approach to working hours.

Working hours, according to Gillies, are central to Gore's approach. There are no set working hours; "people make commitments... they are never imposed and people keep to their commitments." Gillies continues, "Personal and family responsibilities are okay—people have no need to explain if they are not going to be at work, but tend to anyway because we are fair to each other." When commitments require staffing for specific hours, the team in that area decide individuals' hours of work. Some people choose to work from home, and office attendance is recorded only for fire safety. The need to work long hours can arise, as it did for one associate, Ben Stewart, currently a leader, when he was involved in a global project requiring him to spend large amounts of time in the U.S. When a change in his home circumstances arose, Stewart evaluated the time he spent travelling and reduced it significantly by using videoconferencing and conference calls. He adds that his sponsor also encouraged him to travel less, and to take time off to compensate when he does travel.

Outcomes

It is widely believed that Gore's corporate culture which encourages a healthy work-life balance directly contributes to the award-winning success the company has long enjoyed. John Kennedy, a Gore leader and senior associate in Scotland in traditional, external business terms, underlines this belief. He says, "Our culture and principles drive very high performance from individuals and teams, who are empowered and results-oriented with a strong 'can-do' attitude."

Gillies acknowledges that "sometimes it feels like it would be easy and certainly quicker to direct, but in the long-term, we know that doesn't work." She is emphatic that "because we are not telling people what to do and when to be here, there is more chance work is going to be done better. Associates buy into what the company stands for, so the quality of input and decisions is better."

For Stewart, one of the challenges facing associates is that it is “very easy to get caught up in the positive environment and find yourself over-committing.” To counteract this, he notes that “leaders, sponsors and associates need to understand each individual situation and act appropriately.” Kennedy supports this position: “It can be easy to get caught up in an environment of high energy and activity.”

Gore’s approach to work-life balance contributes to its repeatedly being included in *Fortune* magazine’s best companies list.

Way Forward

Continuing to develop associates is seen as central to sustaining the corporate culture and principles that foster work-life balance at W.L. Gore.

Learning Points

- When they are part of a clearly understood management style, work-life balance arrangements can work without being supported by formal policies and procedures. Work-life balance can be an integral part of a holistic management approach.
- Organizations should focus on life issues for employees/associates and actively work on these as well as work development to ensure the balancing of work and life.
- Good leadership and mentorship are important to encourage employees to balance work and their personal life.

<http://www.gore.com>

Discussion Questions

1. What are the key elements in the corporate culture at W.L. Gore that may prevent employees from taking advantage of there being no set work hours?
2. How would you describe the management style and management responsibilities in this company?
3. What are some challenges employers may face when trying to implement W.L. Gore’s distinctive approach to work-life balance in different countries of its operations?
4. What elements of this company’s approach to work-life balance could be adopted by other organizations?

Case Study Two

Job Sharing at Motorola

Background

Motorola was founded in 1928 in the U.S., and currently employs more than 100,000 people worldwide. Today, it is harnessing the power of wireless, broadband and the Internet to deliver embedded chip system-level and end-to-end network communications solutions for the individual, work team, vehicle and home. Motorola employs 1,530 staff in its East Kilbride, Scotland operation, of which about 700 are operators. Motorola operates in a highly competitive global environment; to maintain its competitive advantage, it operates its plants 24 hours a day, seven days a week.

A variety of work-life balance arrangements are offered, many of which are long-established throughout the company. They include part-time work; dependency leave; an employee assistance program (EAP); job sharing; health care (adding some private health care benefits to the state-funded U.K. system); special shift arrangements (non-standard shifts); study leave (time off work to complete sections for formal qualifications); and emergency holidays (when annual leave needs to be taken for non-holiday time). Moyra Withycombe, the human resource operations manager at the East Kilbride location, explains that they are offered as part of being a premier employer and to attract high-caliber people, then recognize and reward them. This fits with Motorola's philosophy of balancing life and work, which has contributed to the company's high rating in America's 100 Best Corporate Citizen award lists for environment, community and employment practices.

Job Sharing in Manufacturing

In 2000, there was a major change in work hours at the East Kilbride plant. The change was intended to standardize shifts throughout the whole organization. Today, full-time Motorola operators work seven 12-hour shifts over a two-week period, on the basis of four days one week, and three days the next. When the work hours were changed, employees were offered job sharing, either on the day or night shifts. Job sharing means that two people share a full-time job between them, splitting equally the number of hours worked. Though not commonplace, it has been an occasional practice in the U.K. for some years, mainly in the public-service sector.

Mary McDonald, a single parent with two children, applied for a job-share on the day shift. She felt the full-time shift pattern was too onerous given her family situation. In making her written application to the Human Resource department, she gave her personal and operational reasons. Her application was successful and,

matched with her job partner, Heather Chalmers, she works in the wafer fabrication production area. McDonald says this system “has worked very well” for her. “I’m full of energy for the days I work—Motorola gets 100 percent from me.” She is extremely positive about job sharing, “especially for people with families...it is very good for family life.”

Alistair Reid, a manufacturing section manager, concurs. He also highlights that Motorola East Kilbride hosts 120 job sharers and explains that they are all included in feedback sessions and the annual reviews conducted to assess the effectiveness of partnerships. He stresses that “the transition to new shift patterns, including job share, allowed us to retain key skills and avoid external recruitment.”

Outcomes

Neil McKinven, a senior line manager, believes that job share plays a high-profile role for the East Kilbride Motorola plant to remain competitive and to meet their performance metrics in the face of stiff global competition. In particular, he notes that “job share allowed us to retain our pool of highly qualified and well-trained talent.” Most job share employees are women who are unable to or prefer not to work full-time due to family commitments. Job share, McKinven explains, “created a different management dimension in developing supporting procedures, such as procedures for holiday and absence cover.” These procedures have been refined over time and now function smoothly.

Reid believes there are important benefits for individuals in job share, and highlights that many women returning after maternity leave value this arrangement. He considers that the most challenging issue is when job share partnerships are fractured during the year when, for example, changes in partnerships necessary for holiday cover arrangements can disrupt the workflow. This means a change in one of the job share partners when holidays are taken. Most job sharers work very closely together to meet their combined job requirements without manager involvement; this can easily change during their holiday leave periods because the temporary holiday employee is unlikely to be very familiar with the regular sharing system between the two main job sharers. Managers may then need to be involved in work scheduling in job share posts during job sharers’ holidays. McKinven stresses the need for standardization and open discussion when developing policies on how people are treated at work with respect to work-life balance arrangements and manager involvement in these. Withycombe highlights the importance of matching business needs and individual requests, and summarizes that overall, “any negatives of work-life balance arrangements are outweighed by the positives.”

Way Forward

Motorola plans to have ongoing reviews of job-sharing practices, together with evaluation of the business effects.

Learning Points

- Job share processes have to be transparent and understood.
- Everyone must be aware of the expectations of them in work-life balance arrangements and consider the profile of the working population in developing such arrangements.
- It is important to maintain good communication between job sharers' working groups and management so that any required changes can be implemented quickly.
- It can be useful to form a team to identify any issues with the new work-life balance initiatives.

<http://www.motorola.com>

Discussion Questions

1. How does Motorola's job sharing system fit with their business needs?
2. What particular needs do female employees face in work-life balance arrangements such as job sharing?
3. What are the advantages and disadvantages of job sharing to job sharers and their managers?
4. What factors come into play in introducing job sharing into other organizations in a U.S. context?

Case Study Three

Health Promotion at IKEA

Background

IKEA is a Swedish home furnishing retailer that sells well-designed, functional furniture at low prices. IKEA is a global business with over 150 stores in more than 20 countries around the world—plus approximately 20 franchise stores—and still growing, most recently in Japan. IKEA operates 25 stores in the U.S. and has 11 stores in the U.K. Two of those U.K. stores are in Scotland, in Edinburgh and in Glasgow.

IKEA's dream is “to create a better everyday life for the many people.” In IKEA's language, the dream's realization lies in the combination of the company's “business idea” and its “human resource idea” which is “to give down-to-earth, straightforward people the possibility to grow, both as individuals and in their professional roles, so that together we are strongly committed to creating a better everyday life for ourselves and our customers.”

IKEA's Swedish heritage is important in the company, as demonstrated by its training for staff on Swedish culture. The Swedish national values of commitment to, and time with, family and community, combined with concern for a healthy environment, are strongly reflected in IKEA's organizational culture and management practices. These values can be seen in its strategic approach that acknowledges work-life balance, to its recognition of the importance of coffee breaks in a pleasant environment for all staff for social interaction. Work-life balance, explains Jill Burgess, human resource manager of the Glasgow store, is “a priority in its own right in IKEA's U.K. business plan.” Inclusion in the current business plan is not to say work-life balance “feels as if it's a new phase for the company, although the term is now often bandied about.” Rather, work-life balance extends naturally from the company's Swedish cultural roots and its “priority of focusing on co-workers to develop the corporate culture,” according to Anders Dahlgv, IKEA president. Work-life balance is expressed, for instance, in paid days off for all staff for first day of school leave, marriage leave and “moving house leave”. It is also expressed in the following areas of existing work-life balance offerings, including flex-time (variation in start and finish times); full-time and part-time work; special shift arrangements (for example, early shifts only); non-standard work weeks (for example, longer but fewer work days per week); emergency leave (for a domestic crisis like a flooding); public/community service leave (such as working on a public service board); leave for caring for dependents; parental leave; sick children leave; information about childcare; employee assistance programs; information and advice on work-life balance; and health promotion.

Health Promotion

One example of combining national and organizational cultures is the health promotion program in IKEA's Glasgow store. There are 480 co-workers there, two-thirds of them part-time and two-thirds female—although the women are not concentrated disproportionately in part-time work. When applying to work at IKEA Glasgow, all applicants are asked to state their preference for full-time or part-time work. Another characteristic of the workforce is that it is mainly composed of “staff who bring enthusiasm, commitment and energy,” according to Burgess. In a newly opened store, a health promotion program may not be expected to be a particular priority. Nevertheless, in addition to subsidized healthy meals from the large and popular public cafeteria, all employees can take advantage of free podiatry (medical foot care) and massage sessions during work time. Burgess believes it is important that “co-workers generally see IKEA as investing a lot in them—and the feedback we get suggests they do.” Offering podiatry and massages relates in particular to the physical nature of much of the work, with staff often working on their feet and wearing protective boots. Doing physical work is not the exclusive preserve of shop floor staff; departmental and senior managers all help when needed.

Business Controller David Montgomerie has taken advantage of the chiropody service. This was a new experience for him and although his initial motivation was the novelty value and curiosity, he now believes promotion of health awareness and general fitness is very important. One of Montgomerie's team is Abigail Jones, an IT specialist. Jones has also used the chiropody service, a first for her. “It's a good perk...IKEA is obviously interested in the well-being of staff and are very people-oriented.” Stephanie Miller, a young part-time employee who works on the shop floor, believes that “health promotion to encourage a healthy lifestyle is a good idea and fun as well.” She did not expect such services, but can see that they are valuable. The most recent initiative in IKEA's health promotion program is an upcoming Fit for Work week. IKEA will offer a range of fitness and occupational health activities during that week. The high rates of staff participation for previous Fit to Work weeks indicate that this program has been well-received by staff.

Outcomes

On an individual level, work-life balance programs help people balance work with other life factors. Burgess notes that “in some cases it can offer the opportunity to experience something new and benefit from it.” In organizational terms, work-life balance is a “win-win situation.” According to Burgess, it increases morale and commitment by improving psychological contracts and gives “something tangible to staff so they perceive IKEA as a caring company that they enjoy working for.” Ruth Huxley, deputy store sales manager, reinforces this view. According to Huxley, “the way in which IKEA works with work-life balance arrangements has a very positive impact on co-workers...it makes them feel that the company cares about them as individuals and, as a result, gives them a greater sense of loyalty.” Work-life balance arrangements also have a positive effect on attendance and staff retention, raises the profile of fitness and health, and lets staff see that there is an investment in them. They are so ingrained in the way IKEA runs its business that quantified data is not

produced to measure the benefits of the arrangements. However, key performance indicators such a higher-than-industry average in employee retention, lower-than-industry average in absence rates, and frequent employee referrals to new recruits strongly point to tangible benefits of work-life balance activities. There is “the risk [that] people take work-balance programs for granted and see them as a given, not a perk,” notes Burgess. Above all, she says, work-life balance programs “send the right message of the company’s culture and support it with actions.” It is noted that managers are central to delivering work-life balance initiatives. “The message from managers to co-workers has to be, ‘Don’t just take time off work for life factors; let us in, talk to us and we can try to support you,’ ” asserts Burgess. In this way, IKEA is open to new ideas for work-life balance programs.

Way Forward

Development of work-life balance initiatives is seen in positive terms with an open-minded attitude. The possibility of working from home within operational constraints is being considered. So too is initiating and funding social events for all staff and their families.

Learning Points

- Work-life balance is tied closely to organizational culture.
- Work-life balance is not just about flexibility in work for life outside work, it also works the other way around: “Bringing aspects of wider life—like health initiatives and socializing—into work can be fun” (Business Controller).
- “The best way to engage more people in work-life balance programs is to let co-workers who have experienced it advocate it by word-of-mouth” (Business Controller).

<http://www.ikea.com>

Discussion Questions

1. What aspects of American culture could be considered in work-life balance arrangements in U.S.-based IKEA stores?
2. What potential cultural work-life and life-work conflicts can you identify in IKEA’s approach to work-life balance in different countries?
3. Which of IKEA’s work-life balance arrangements are innovative in the U.S. context?
4. What are the implications of operating these arrangements for managers and employees in the company’s U.S. stores?

Case Study Four

Emergency Leave and the Employee Assistance Program (EAP) in the Scottish Court Service

Background

The Scottish Court Service (SCS) comprises 52 court sites and employs approximately 1,000 civil servants. It extends throughout Scotland, from the Shetland Islands to Kirkcudbright in the Borders, and from the Outer Hebrides to Peterhead on the east coast. This system is divided into three operational areas: agency headquarters, the Supreme Courts and the Sheriff Courts. SCS Headquarters is in central Edinburgh, where 77 staff are based. The Supreme Court has offices in Edinburgh and Glasgow, but does go on circuit to the main Sheriff Court sites. The Sheriff Courts span Scotland and are divided into three areas, east, north and west, each with its own distinctive features. The Sheriff Court in Glasgow is the busiest court in Europe. This extensive network provides the courthouse services and processes to manage access to justice in Scotland. The strategy statement of the SCS is “to help secure ready access to justice for the people of Scotland, delivering a high quality service to all who use the courts.”

According to SCS Human Resource Director Alan Swift, SCS has always been enlightened in its human resource policies. However, it was not until 1998 and '99 that SCS started to get serious about work-life balance. Discussions with the Public and Commercial Services Union over paternity leave, the loss of some key staff (in particular women, who comprise 57 percent of the workforce), competition for recruiting quality staff, and an internal exploration about what it meant to work for the service all contributed to the new focus on work-life balance policies and practice. The most important of these factors was the loss of female staff, who said they were leaving because they were unable to reconcile their work and family commitments. While only a few women left for this reason, the effect of the loss of their experience and skills was high; and it encouraged the SCS to think about work-life balance arrangements. Today, SCS offers a variety of such arrangements, which, according to Chief Executive John Ewing, “help people to give their best at work” and improve staff retention. The new arrangements also signal to current and potential employees that they are valued and treated well in the organization.

The SCS developed the work-life balance policies and procedures using a participative approach including the involvement of all staff. Work-life balance arrangements at the SCS include:

- Flex-time: employees chose to start work any time between a defined period (for example, 8 a.m. to 10 a.m.) and finish any time between a defined period, as long as a specified total of working hours are actually worked every week.
- Home-working: employees can, with permission, work from home for a certain period every week.
- Job sharing: two employees share the responsibilities and roles of one full-time job between them, so that each one works part-time within a full-time role.
- Study leave: periods of a week or more to support completion of a formal qualification (such as an MBA) to study for exams.
- Emergency and special leave: to cover a variety of domestic situations or family circumstances, such as a sick family member.
- Public community service leave: involving voluntary work, such as a visit to another country with a registered charity.
- Care leave: where any close dependent, whether young, old or ill, needs to be looked after for a period of time by the employee.
- Parental leave: in addition to the legal entitlements for mothers and fathers; for special events like school graduation.
- Childcare financial allowances: for nursery care of preschool children, for example; information about childcare is also available.

Emergency/Special Leave and the Employee Assistance Program

The birth of his third child five years ago was a life-changing event for Joe Smith, then an executive officer at Dumbarton Sheriff Court. Smith's daughter, Rebecca, was born with a complex heart disease and not expected to live. However, against the odds and after 13 operations which started when she was three days old, Rebecca is now in the first year of elementary school. She has spent about 18 months of her life in the hospital and faces a heart-lung transplant operation at some point in the future.

"From the word go, the managers at SCS supported us," explains Smith. While Smith and his wife were coping with their daughter's fragility for the first 18 months of her life, Smith tried to manage work. For a time after he was promoted to the Stirling Sheriff Court, he was driving 84 miles a day from home to work and Rebecca's hospital. Realizing this situation was not sustainable—and even dangerous—Joe contacted Swift. Smith's wife, then a court officer in Dunbarton Sheriff Court, was immediately granted extended special leave, and Smith special leave. Smith also accessed the SCS Employee Assistance Program (EAP) for private counselling on managing his daughter's problems. This service is public-sector

(general taxpayer) funded, so it is free to SCS employees though it is privately run on a contract basis. The aim is to help employees deal with any issues that affect their performance and/or attendance at work. As Smith explains, he “began to see the benefits and let them help...it was almost like instant relief, trusting in the policies and the people.” So important was this help that he said he should have done it sooner. Now in Glasgow Sheriff Court and promoted to higher executive officer, Smith cannot praise the handling of his circumstances highly enough: “All the managers have supported me, and it’s two-way.”

Smith’s line manager since September 2000 is Jim Hamilton. Hamilton is a senior executive officer and the head of the Civil Department at Glasgow Sheriff Court, the largest court in Scotland. For Hamilton, Smith’s situation had two main components: the operational needs of the department and providing Smith with the support that was clearly needed. He could address both components because he “knew what the position was when Joe transferred to Glasgow, so it was easier to plan for leave.” Further, Smith’s peer group were aware of the situation and all pulled together to help.

Outcomes

Smith speaks highly of the support he, his wife and family received from SCS. Their exceptional circumstances speak to the value of work-life balance arrangements in this organization. Ewing also testifies to the benefits of work-life balance initiatives: “in a pressurized work environment, work-life balance programs signal the value of staff...they can also reduce stress and allow staff to keep contributing at work.”

As much as work-life balance arrangements can bring real organizational benefits, it is generally recognized in SCS that they can bring with them some issues too. For example, Swift observes that “people can take work-life balance initiatives for granted after a while,” seeing it as a norm, not a benefit. Further, Swift continues, there is “the possibility of disenfranchising employees who may not get the benefits.” While work-life balance arrangements may motivate employees who access them, those who do not may become unmotivated. Also, line managers sometimes need to make decisions about work-life balance requests “that are not popular...but ensure the operational needs of the courts”—which means not always agreeing to employee requests for work-life balance arrangements due to organizational needs. Although policies and procedures for work-life balance arrangements exist, it is often for line managers to determine and communicate, on a case-by-case basis, if the business needs can still be met when employees are granted the arrangement. Employees have to appreciate that they do not have an automatic right—on either a legal or organizational basis—to have these arrangements. However, since 2003, parents of children less than 6 years of age have a general legal right to apply for flexible work. They are required to make a business-based case for their application, which is considered by the organization without any set legal duty to allow any flexible work pattern.

Way Forward

The SCS currently has a committee, which includes employees who have primary responsibility for caring for dependents, that is focusing on the dimensions of care issues other than childcare (for example, elder care). It is also considering surveying employees about their opinions of SCS' work-life balance policies during the next staff opinion survey.

Learning Points

- It is important that staff align their expectations of work-life balance initiatives to business needs.
- Employers are more likely to benefit from work-life balance arrangements if they ask the people who will be directly affected by them what types of arrangements they want.
- Try to understand the situation from the individual's point of view; this gives you a greater awareness of how you should treat staff.
- Support line managers making the decisions on implementing the WLB policies through training and coaching.

<http://www.scotcourts.gov.uk>

Discussion Questions

1. What current care issues should members of a work-life balance committee consider?
2. What factors should managers take into consideration when presented with an employee's request for a work-life balance arrangement?
3. How should managers communicate their decisions on work-life balance applications?
4. In addition to the types of work-life balance arrangements at SCS, what other initiatives can you think of?

Case Study Five

Career Breaks in Lothian and Borders Police Service in Edinburgh, Scotland

Background

Lothian and Borders Police (LBP) employs approximately 2,600 police officers and 1,100 support staff. Headquarters are in the center of Edinburgh, Scotland's capital city. There are six divisional headquarters. Its mission, central to policy development and operational goals, is "to prevent crime, keep the peace, protect and reassure the community, uphold the law firmly and fairly, and pursue and identify those who break the law." One of the supporting strategies is the intent to improve people management. An important example of developing people management in LBP is the recent establishment of a specialist diversity unit, the first of its kind in a Scottish police force. The purpose of this unit, according to Chief Inspector Gavin Buist, is to coordinate responses to individual [public and employment] issues where diversity plays a part and to encourage the employment of people from underrepresented groups.

Over time, it is expected that the diversity unit will bring new dimensions to work-life balance in LBP from different employee groups such as ethnic minorities and disabled people. Another important example of improving people management is the general and ongoing work in developing work-life balance policies. There has been a concentrated effort in the last two years on this development, although LBP has a long history of flex-time and special leave.

Donald Ramsay, personnel services manager, explains that development of work-life balance programs to make workplace policies more user-friendly is now an important area of people management for a number of reasons. First, greater work is now requested from serving officers and support staff. Flexibility is also expected by new applicants, including women and minority groups, whom LBP is targeting in their recruitment drives. Secondly, the combined effects of more employment legislation and the high media profile of discrimination cases make it more important to avoid potential discrimination. Lastly, it is recognized that work-life balance policies should be applied consistently and that management style is highly significant in ensuring consistency.

The current work-life balance arrangements for which employees in LBP can individually apply are:

- Flex-time, a system whereby employees can choose to start work any time between a defined period (for example, 8 a.m. to 10 a.m.) and finish any time between a defined period, as long as a specified total of working hours are actually worked every week.
- Full-time or part-time work.
- Job sharing, where two employees share the responsibilities and roles of one full-time job between them so that they, in effect, work part-time within a full-time role.
- Special shift arrangements, such as compressed work hours or longer shifts over fewer working days in a given working period.
- Voluntary reduced time, when employees work fewer than their normal working hours for a specified time with a pro rata reduction in salary.
- Career breaks, when employees take a significant amount of time off work to pursue a non-work activity, such as being a stay-at-home parent for six months without pay.
- Study leave, to prepare for exams for a formal course of study such as a law degree.
- Special and emergency leave, for unexpected events like a family bereavement.
- Responsibility breaks, meaning not engaging in a particular job responsibility on a temporary basis.
- Sports achievement leave, like training for participation in an Olympic team.
- Care leave, to arrange for the care of a dependent person or to act as a caregiver for that person.
- Sick children leave.
- A range of work-life balance services under an occupational health unit and welfare department.

Career Break

Louise Parker joined LBP in 1997 as a full-time clerical assistant. After three years she began to think seriously about travelling. In March 2000, she requested a year off to travel; by June 2000 she was flying to Australia to explore Southeast Asia on her own. In taking what Mariana Forsyth, HR advisor, calls “the purest form of work-life balance” while someone else filled her job on a fixed-term contract, Parker returned to LBP 54 weeks later a completely different person. Her experience played a large part in changing her perspectives and developing her skills so she can bring added qualities to work. Learning about different cultures, challenging stereotypes, improving communication skills and developing self-confidence are all cited by Parker as part of her personal learning journey. While on her travels, Parker felt

comfort knowing that there was a job to return to. During her career break, though, she received no employee benefits; in effect, a career break suspends an employment contract until resumption of the job.

Outcomes

Nearly a year after her return, Parker admits to still feeling that she is settling back into work, a process she has found “really difficult...I felt a lot of pressure on myself when I first came back as I had to relearn policies and basically how things work.” At the same time, however, she says she is absolutely committed to her job and strongly feels that she should give something back. Further, now promoted to a divisional personnel officer and studying part-time for a postgraduate diploma, she reports on having “a different and better perspective on how to deal with people.” Several colleagues and Ramsay testify to the positive change in Parker due to her wider life experience. Ramsay firmly believes that Parker is a success story that has benefited the Department and Force.

With regard to the more general organizational effects of work-life balance, Ramsay asserts that there is now “a much greater awareness of work-life balance throughout the force; staff realize we will try to accommodate flexible working.” He continues, “From a management point of view, we now have some good examples of work-life balance programs that work; and there is nothing like that to convince managers. Work-life balance has helped us retain people with key skills, reduce turnover, employ more part-time staff and respond to fewer requests for transfers.” Ramsay recognizes that there is “still a long way to go in terms of cultural issues.” Managers can still feel sometimes that work-life balance can potentially disrupt operations; work-life balance can raise expectations to an unreasonable level, although Ramsay reports that the vast majority of requests are realistic. In addition, there can be a perception that work-life balance arrangements can be related to an individual’s perceived performance, in that those with better performance are perceived to be better able to take advantage of work-life balance. In general, however, the Assistant Chief Constable of LBP, Malcolm Dickson, considers that work-life balance should result in “a more contented, less stressed workforce who are therefore more productive and less likely to succumb to stress-related illnesses.”

Way Forward

With growing experience of various work-life balance arrangements, LBP plans to monitor the effectiveness of their work-life balance policies in order to produce tangible evidence to demonstrate in practical terms how they work and their return on investment. Also, the range of individual work-life balance policies have recently been consolidated and extended a little into one detailed work-life balance policy document for imminent implementation.

Learning Points

- “If you get the employee back [from a career break], it *has* to benefit the organization, as you come back with added qualities” (Divisional Personnel Officer).
- “Learning from [work-life balance] experience is important to show what it means for managers and individuals in practice, not just in principle” (Personnel Services Manager).
- “Management style is a central part of work-life balance, so it needs continuous development and support” (Personnel Services Manager).
- “Work-life balance has to be a balance between what the organization needs and what the individual needs” (Assistant Chief Constable).

<http://www.lbp.police.uk>

Discussion Questions

1. Which types of work-life balance arrangements offered by LBP could be adopted by police departments in the U.S.? Why?
2. What other work-life balance arrangements have potential in American public service organizations? How can U.S. employers retain employees returning from a career break with a different mindset?
3. What are the recruitment implications of work-life balance arrangements?
4. What training support should be offered to managers whose employees are seeking a work-life balance arrangement?

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