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Executive Summary

Over the last 25 years, the challenges and complexity of combining paid employment and personal/family responsibilities has taken center stage as an area of interdisciplinary research. The prominence of this topic reflects its significance as a critical business issue, a public policy concern, and a matter of vital importance to employers, individuals and families. Current thinking about work-life balance practices in organizations demonstrates a paradigm shift that recognizes and respects the challenges of combining paid work and family care, but also recognizes the value many Canadians place on a variety of non-work roles, including involvements in educational, cultural, recreational and volunteer activities that provide personal meaning and help build social cohesion. On their part, businesses and HR professionals have also shifted with many aligning work-family/work-life balance practices with a broader, more strategic focus on fostering employee engagement, i.e., motivating, recruiting and retaining employees in a highly competitive environment. Flexible work arrangements, telecommuting, and a variety of leave, family support and wellness programs are more often integrated and aligned with business objectives. Consequently, there is strong interest in evaluating the impacts of these practices and assessing their relative return on investment (ROI).

Purpose:

The purpose of this report is to provide a structured and accessible review of academic, policy and business research and literature to guide employers, managers and policy makers responsible for making decisions about how best to support employees facing diverse caregiving and personal responsibilities. We review the reasons why many organizations do not systematically assess costs and benefits and consider what measures and resources might be used for this purpose.

Method:

To address project objectives, we surveyed a wide range of studies and sources of business information published since 1990, initially focusing on Canada and the US and then extending to include the UK, Australia, New Zealand and Continental Europe. We conducted key-word searches in three major academic databases (PsychINFO, ABI Inform and Social Sciences Citation Index) using variations on work-life balance, work-life practices, employee benefits, ROI, and employer outcomes, as well as specific terms such as alternate work arrangements, teleworking, and flexible scheduling. Our initial focus on academic sources was expanded to include business periodicals and major studies from government and non-governmental organizations' websites. Our main selection criteria were that sources should address one or more employee or organizational outcomes of work-life balance practices, with priority given to studies that provided information for calculating organizational ROI. Despite their prevalence, we did not include materials that reflected organizational self-promotion/marketing or that did not contain adequate information about how cost savings or other benefits were realized.

Overview of Results:

- (a) It is clear that calculating the ROI of work-life balance practices is a challenging task. Doing so requires clarity about what the intended goals of the program/practice or bundle of practices are intended to accomplish in the short, medium and long-term. Some benefits accrue to individual employees, while others are reflected in the performance of units or broader organizational impacts (including cost savings, increased productivity, shareholder value, and increased customer satisfaction and retention). ROI calculations are most easily done on specific programs or practices when estimates can be made of labour cost savings as a result of reduced absenteeism, savings resulting from reduced turnover and recruitment/replacement costs, and improved performance when it can be measured objectively. Both direct and indirect costs and cost savings should be included and, ideally, net costs should reflect expenditures and investments over time. Approaches that reflect a longer-term human investment approach may use measures of employee engagement, organizational commitment, retention of high performers, and indicators of career advancement within the organization. Relatively few studies use measures of profitability or shareholder value, but a few confirm that programs that are highly targeted to meet employees' needs and the reputational benefits of being named a 'best employer to work for' have some impact on shareholder value and ease of recruiting from a wider talent pool.
- (b) There is clear evidence of a model of effects. Availability and use of work-life balance programs and practices, when provided in the context of supervisor and organizational support can reduce work-life conflict and increase positive appraisals of one's organization. These effects are often associated with employee attitudes such as increased job satisfaction, organizational commitment and reduced intent to turnover. These attitudinal impacts, in turn, are associated with increases in performance (although results vary across studies), reduced absenteeism, reduced turnover, and higher customer satisfaction.
- (c) There is also much that cannot be determined or remains invisible. It is believed that many employees, especially those in SMEs benefit from informal arrangements that are negotiated individually with an employer or supervisor.
- (d) Much of the research and business writings are drawn from the US and from large organizations and there are consistent findings that work-life balance practices are more common in larger organizations in such fields as finance, telecommunications, pharmaceuticals; unionized environments, and often in workplaces that rely heavily on a large proportion of women. Despite this bias, however, it is evident that flexible work schedules and a range of other work-life balance practices can benefit SMEs. There is also research that suggests that low-wage workers can benefit from flexible work options and work-life balance practices, as well as access to benefits and training opportunities that might otherwise not be accessible.

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- (e) The need for and opportunities to provide workplace supports occur within a public policy context. Differences across countries and jurisdictions affect employees' entitlements to paid maternity, parental and carers' leave, access to part-time work, community-based child care, and other community supports. Governments can also play an important role in educating and supporting employers to assist them to respond to employees' needs, as evident in the UK's efforts related to employees' right to request accommodations to reduce work-family conflict and stress.

Gaps in our Current Knowledge:

- (a) There is limited research that reliably assesses employees' access to various work-life balance practices, and the long-term effects of using them. There is also limited research on change processes, i.e., how employers and managers adapt new practices and what resources would be most useful to assist them to implement programs effectively.
- (b) There is limited research (although some has recently appeared) on how work-life balance practices affect subgroups of employees differently (managers and general employees, those with younger and older children, low wage workers). There is also a need to consider research on specific occupational groups, particularly health professionals and human service workers to assess how organizations can address employee and client needs effectively.
- (c) There remains much to learn about SMEs and how best to support their capacities to support employees' work-life balance, especially during a time of increased economic pressure.

Suggestions for the Future:

Researchers and HR professionals could benefit from greater partnership and the opportunity to engage in collaborative efforts, including the opportunity to share research and practice knowledge. It would also be beneficial to establish a clearinghouse of information on work-life balance practices, their assessment and ROI methods for Canadians. Practical information, resources and tips for implementation have been developed in certain jurisdictions, and have been positively received in the UK. This is an area where active knowledge mobilization could be used effectively, especially if there is a continuing vehicle for sharing research, practice and policy-based information.

1. Introduction

Over the last 25 years, the challenges and complexity of combining paid employment and personal/family responsibilities has taken center stage as an area of interdisciplinary research. The prominence of this topic reflects its significance as a critical business issue, a public policy concern, and a matter of vital importance to employers, individuals and families. Research in Canada and elsewhere has identified some of the key factors that have led to a sizeable proportion of employees (one third to one half in various surveys) reporting high levels of work-life conflict (WLC), job stress, and dissatisfaction when trying to maintain a balance between work and family responsibilities. Key contributors to the gap between what employees want and what they experience include: long work hours; increased workloads; workplace cultures that inhibit work-life balance; workplaces that do not provide the flexibility needed to meet work, personal and family responsibilities; and lack of appropriate child and elder care resources.¹

Although earlier research and efforts by business to resolve some of these problems originally focused on accommodating the needs of parents (particularly mothers) with young children, many employers and policy makers now appreciate the challenges experienced by employees with a broader range of caregiving responsibilities. In fact, as a result of population aging and other demographic factors, an increasing number of employees are or will be providing care and support for seniors and for family members with disabilities or chronic health problems, as well as in situations when a family member experiences an acute health problem. In addition, there is a growing trend towards enabling all employees to combine paid work with a wider range of non-work activities and interests (e.g., volunteering; participation in religious, cultural and recreational activities; skill development and life-long learning).

The transition from viewing work-life balance practices solely as a means of accommodating individual employees with caregiving responsibilities to recognizing their contribution to organizational performance and employee engagement is an important paradigm shift that is still very much ‘in process.’ Moreover, the extent to which it will permeate all workplaces in Canada remains to be seen. Yet, an increasing number of employers and human resource (HR) professionals now see a stronger convergence between addressing work-life concerns and other business goals, particularly leveraging the talents of a more diverse workforce and promoting high commitment and employee engagement to maximize individual and organizational performance. There is widespread agreement that employers can capitalize on the synergy between addressing HR issues, work-life concerns, and organizational practices that incorporate new ways of working to integrate all three with strategic business goals.² In effect, HR and work-life balance practices can and should be used in an integrative and strategic manner to meet both business and employee needs.

The contemporary business environment is characterized by an increasing need for adaptation and risk management. While employers in different industries and in different locations face very different challenges, all must face the challenge of attracting, retaining and motivating employees in changing times. Longer-term demographic and labour market concerns related to an aging, smaller and more diverse workforce remain, although some employers' more immediate concerns might be very different – from the challenges of recruiting and retaining employees in a highly competitive labour market to the need to improve morale and productivity while downsizing and restructuring as a result of a merger or the current economic downturn.

Other external pressures are evident as support for work-life balance and employee engagement becomes a visible benchmark among high-performing organizations that reap the economic and reputational benefits of being publicly recognized as a 'best place to work' or an 'employer of choice.' Indeed, although these concerns are evident across all sectors and industries, how employers respond varies depending on workforce characteristics, the nature of work and the way it is organized, technological capacities, and employers' perceptions of the relative costs and benefits of specific work-life balance practices.

There is currently an extensive body of literature that promotes the business case for work-life balance practices and more flexible work options. Indeed, interest in such practices continues to grow in academic and corporate research, business reports, government documents and resources, and newsletters produced by and for various business organizations. Still, many employers and HR professionals are faced with practical questions and concerns regarding the implications of adopting such programs:

- Which work-life balance practices would be most helpful to support employees with competing work and caregiving roles?
- How can flexible work options be implemented in this workplace?
- Is this the 'right time' to introduce more flexible policies or new programs?
- What are the costs of introducing new programs and practices?
- Will work-life balance practices result in significant benefits, such as reduced absenteeism, increased retention, and improved productivity?
- How can win-win solutions be constructed so that client/service quality and accessibility to services are maintained?
- What is or will be the return on investment (ROI) of work-life balance practices and how can it be calculated in a meaningful way?

1.1 Purpose and Scope of this Report

The purpose of this report is to provide an up-to-date and extensive literature review on the costs and benefits (ROI) of work-life balance practices. It examines the existing body of interdisciplinary research on workplace work-life balance policies and practices intended to reduce negative employee outcomes, e.g., absenteeism, low organizational commitment and job satisfaction, increased stress and WFC, and poorer physical and mental health. Such outcomes typically result in lower productivity and in recruitment and retention challenges for employers, as well as higher benefit costs and reduced customer/client satisfaction. The review is intended to be relevant to workplaces in the public, private and non-profit sectors and applies to small and medium enterprises (SMEs) as well as larger organizations that have often been the focus of research and business analyses.

The scope of what we consider to be ‘work-life balance practices’ for the purpose of this report is deliberately broad; thus, this review reflects the paradigm shift we referred to earlier. We include practices that are typically associated with ‘family-friendly’ provisions that may ease the stresses on employed parents and caregivers such as maternity, paternity, parental and adoption leave, child care and elder care supports, and options to work at home or with more flexible schedules to accommodate work and care. We also include more recent research studies that embrace a wider frame and consider the impacts of flexible and alternative work arrangements that may be used by a wider range of employees for a broader set of purposes. These studies adopt a more integrated perspective on workplace effectiveness, employee performance and HR development with the expectation that benefits will accrue to all employees.

Recent research has identified a variety of factors that impact on employees’ access to and experiences with work-family and work-life balance practices. The research on the organizational outcomes and implications of such practices has been equally broad and, at times, contradictory. In particular, it has been suggested that an examination of the use/non-use and effectiveness of work-life balance practices must incorporate the effects of workplace culture and supervisor support of employees’ efforts to balance work and family responsibilities.³

The aim of this review is to enable Canadian HR professionals and others to navigate the extensive literature in this highly complex field. Specifically, we provide a structured and accessible review of academic, policy and business research and literature to guide employers, managers and policy makers responsible for making decisions about how best to support employees facing diverse caregiving and personal responsibilities.

While the review is intended to be practical, it is also important to identify some of the conceptual and methodological challenges associated with both conducting and

interpreting cost-benefit analyses. A separate section on methodological challenges is included in Section 2.

Our research suggests that access to flexible work arrangements (FWAs) and family support related to child/elder care information is increasing, albeit at a slow pace and for a variety of reasons. The proportion of US and Canadian employees surveyed who report having some flexibility in their daily work schedule was 43% for US employees in 2002, up from 29% in 1992.⁴ In Canada, approximately 40% of Canadian employees (excluding government employees) reported having some degree of flexibility in their work schedules in 1999 (35.8% in 2003), and 10-11% said they could telework (with use statistics of 5.6% for women and 5.9% for men).⁵ In both the US and Canada, national surveys⁶ suggest that the number of employers providing workplace child or elder care assistance has increased somewhat, although it is still quite limited. In 1999, employer-provided services or information related to child or elder care was reportedly available to 12% of Canadian employees, although less than 2% actually used those services.⁷

1.2 Assessing the Return on Investment of Work-Life Balance Practices as an Organizational Imperative

Employers and employees are clearly demonstrating a keen interest in experimenting with more flexible work options and enabling a better balance between paid work, caregiving and other roles and responsibilities. Policy makers in a number of countries are also exploring ways to extend access to FWAs, family-friendly work schedules and family support through policies, legislation, and information and resources for employers.⁸ Of particular interest are new policies, such as those adopted in the UK, that provide employees with the ‘right to request’ flexible work options or schedules that accommodate family care responsibilities. In this context, accurate cost-benefit analysis of work-life balance practices and information about how to ensure their effectiveness is essential. Indeed, some employers and researchers have suggested that it is a matter of urgency.

There are a number of reasons why organizations should assess the ROI of work-life balance practices. First, senior executives and HR professionals with responsibility for implementing and managing such practices need to know whether they are an effective use of organizational resources in order to make decisions about policy implementation and sustainability.⁹ Second, effective analysis and decision making requires a clear understanding of the intended objectives of work-life balance practices, attention to implementation issues, and a willingness to examine organizational values and supervisory processes impacting on employer and employee take-up. Third, analysis of the effectiveness of work-life balance practices requires a systematic approach to evaluating how they affect employee performance, attitudes, retention, and career development and the achievement of organizational goals such as productivity/quality of service, customer satisfaction, and shareholder value.

Nonetheless, efforts to estimate the economic impact of work-life balance practices have been sporadic at best, with an over-reliance on corporate anecdotal information and national demographic statistics. In a Conference Board study of 220 Canadian organizations, only 30% of respondents who provided at least one FWA had undertaken a formal evaluation of the program. Even fewer had evaluated their special leave policies, child care benefits or elder care/other dependent care benefits.¹⁰ According to a 2001 Harvard Business School study of 968 companies, *The HR Scorecard: Linking People, Strategy and Performance*, the vast majority of employers either did not determine whether their work-life balance practices were successful, or relied on subjective estimates and/or intuition.¹¹ Thus, despite the relative abundance of reports and case studies extolling the ‘success’ of work-life balance practices, clear and detailed calculations of the organizational ROI of work-life balance practices are relatively scarce.

There are a variety of reasons why employers are not evaluating the ROI from work-life balance practices. Certainly, defining performance outcomes, measuring intangibles, and disentangling the effects of specific work-life balance practices from other HR practices and other changes occurring in and outside organizations is a challenging and complex task. Despite these difficulties, however, there is a substantial body of academic and business literature that identifies the organizational benefits of such practices.

A number of studies, for example, support the business case for FWAs, telework and employer-provided child care supports by showing economic and efficiency returns from cost savings resulting from reduced absenteeism and turnover,¹² reduced real estate and overhead costs for firms that invest heavily in telework,¹³ and enhanced productivity and performance.¹⁴ Nonetheless, effects can vary across organizations and departments within organizations, types of alternative work arrangements, and specific employee groups. An overall conclusion of much of the research is that work-life balance practices are most effective when they enhance employees’ autonomy and increase their capacity to perform well in work and in family situations. Given the diversity in individual circumstances, ‘one size fits all’ solutions are unlikely to be as effective as those that are individually tailored. Yet, contextual diversity notwithstanding, supervisory support and some degree of flexibility appear to be no-cost, universally desirable, and beneficial to almost all employee groups.¹⁵ Ideally, outcomes accrue not only to employees who use specific practices but also to managers as a result of learning new skills, co-workers who work in more effective teams, customers and clients, and shareholders.

1.3 Matching Efforts to Desired Workplace Objectives and Indicators of Achievement

Our review suggests that organizations consider a wide range of potential outcomes of work-life balance practices, including those that address both strategic objectives and improved individual and work group effectiveness. Table 1 illustrates individual, work group and organizational goals that may be important for employers and the kinds of measures that are useful to assess those goals.

Table 1 – Organizational Goals and Measures of the Effectiveness of Work-Life Balance Practices

Goals	Measures
Individual and Work Group Effectiveness	
Reduce costs/improve productivity.	Absenteeism, turnover, productivity losses.
Improve employee health.	Employee physical and mental health, morale; Benefit costs; Employee assistance program (EAP) usage.
Increase employee loyalty and commitment.	Employee satisfaction, organizational commitment, likelihood of remaining with the organization.
Improved ability to manage work and personal life commitments.	Work-life conflict; Satisfaction with work and personal life.
Enhance individual and work group effectiveness.	Individual job satisfaction and performance Effective teams, communication and support among team members.
Strategic Organizational Objectives	
Have policies and programs that are responsive to the changing demographic profile of employees and that support work and personal life effectiveness.	Number of relevant programs and policies; Program utilization rates; Employee satisfaction with programs and policies.
Strengthen service-profit chain linkages.	Customer satisfaction, revenues.
Reinforce business strategies by strategically investing in human capital.	Skill development and career advancement Profitability, growth, recognized quality.
Enhance the organization's reputation.	Public knowledge and recognition.

Adapted from Bachmann (2000) and Lobel (1999).¹⁶

Lobel and Faught (1996)¹⁷ suggest that questions about the ‘value added’ of work-life balance programs and practices can be assessed from four directions: a *human cost* approach that focuses on the labour costs associated with specific interventions; a *human-investment* approach that focuses on the long-term payoffs of addressing work-life needs (e.g., retention of highly engaged and valued employees); a *stakeholder benefits* approach that focuses on benefits that accrue to shareholders, employees and customers; and a *strategy* approach focusing on the extent to which work-life balance practices reinforce broader business strategies and goals. Which approach or combination of approaches an employer might use reflects the purpose of their evaluation. It also reflects the extent to which they have adopted an integrated, longer-term approach and whether work-life concerns are integrated into business planning.

As noted previously, the industry, organizational and labour market concerns impacting on an individual employer at a particular point in time may make one or more objectives more salient. In Canada, employers in Alberta and other areas, for example, have had particular difficulty recruiting employees during an economic boom. Similarly, a recent report from the Canadian Federation of Independent Business (CFIB) noted that an increase in the number of SMEs experiencing long-term vacancies affects the capacity to grow and sustain the businesses in this sector.¹⁸ While recruitment may be the most significant concern for some employers, a reading of the current research suggests that reducing unplanned absenteeism, retaining valued workers, enhancing employees’ capacities to manage work and family responsibilities, and increasing employment engagement are key drivers for many employers – and ones that can be used in cost-benefit analyses.

Clearly, there must be synergy between the implementation of specific work-life balance practices and the contextual factors driving the need for organizational change.¹⁹ Thus, for example, in the summer of 2008, high fuel costs led the Utah state government to move to a 4-day work week with compressed hours, primarily as a cost-saving measure. In order to maximize positive organizational and individual outcomes of this change, the state government worked with employees to ensure that new policies and practices were implemented in ways that accounted for personal and family circumstances. This example also illustrates the strong connectivity between work-life balance, organizational work practices and broader organizational goals. It also demonstrates that some ‘work-life balance practices’ – in this case a compressed work week – may be introduced primarily for another organizational purpose, and only secondarily as a way to facilitate work-life balance.

1.4 Theoretical Framework

The theoretical framework upon which this review is based builds primarily on the extensive body of literature on work-family conflict (WFC) that has been accumulating for the last two decades. Researchers such as Duxbury and Higgins, Frone, and Kossek and Ozeki have

contributed to our understanding of the antecedents and consequences of WLC. We know that heavy job demands, particularly when accompanied by an organizational culture that does not support work-life balance, leads to increased role overload and WLC. Although work-life balance practices can reduce the amount of WLC experienced, resulting in more positive outcomes, their effectiveness is moderated by the context in which work occurs and by other types of practices (or lack thereof) available from organizations, supervisors, co-workers and society at large. In addition to research on WFC, more recent literature on work-family facilitation and a broader work-life frame are incorporated as well. The latter, in particular, draws on business and organizational literature that focuses on the importance of HR practices as factors affecting employee engagement and commitment as critical factors that affect performance, productivity and retention.

1.5 Organization of this Report

This report is divided into 9 sections and two appendices. In the next section we discuss the methodology used in compiling the report, including the characteristics of the research studies incorporated and the challenges involved in assessing the ROI of work-life balance practices for employers. Section 3 provides a discussion of work-family/work-life conflict, its antecedents and its consequences. In Section 4 we discuss the prevalence and nature of workplace/work-life balance practices in Canada and elsewhere. We also address employers' reasons for introducing such practices and factors affecting access and uptake as well as the implications of public policy. Section 5 reviews the impact of various aspects of the organizational context on the effectiveness of work-life balance practices. In Section 6 we review the literature on the impact of various work-life balance practices on employees' attitudes and perceptions. In Section 7 we address organizational and employee outcomes, including themes relating to job performance and productivity, tardiness and absenteeism, and recruitment and retention. Section 8 addresses the organizational ROI including approaches to calculation/quantification. Section 9 summarises the lessons that can be learned about the ROI for work-life balance practices and the implications for Canadian managers and corporate executives. An appendix consisting of an annotated bibliography of selected articles (Appendix A) and another appendix consisting of a list of acronyms (Appendix B) accompany this report.

2. Methods Used for this Review and Observations on the Available Literature

To address project objectives, we surveyed a wide range of studies and sources of business information, initially focusing on Canada and the US and then extending to include the UK, Australia, New Zealand and Continental Europe. Taking a selective approach, we initially planned to focus on research published in the past five years; however, because many studies were published during the 1990s we extended our search to incorporate that time period.

Relevant literature pertaining to this topic spans several disciplines, including industrial-organizational psychology, economics, HR, sociology, and business. We conducted key-word searches in three major academic databases (PsychINFO, ABI Inform and Social Sciences Citation Index) using variations on work-life balance, work-life practices, employee benefits, ROI, and employer outcomes, as well as specific terms such as alternate work arrangements, teleworking, and flexible scheduling. Two preliminary scans of the literature provided to us identified some key studies and sources, as well as several recent articles conducted by colleagues in Québec that were only available in French. Initially, we concentrated on peer-reviewed journal articles and academic books that were based on empirical studies and literature reviews. We later expanded our search to business periodicals and major studies from government and non-governmental organizations' websites.

Our main selection criteria were that sources should address one or more employee or organizational outcomes of work-life balance practices, with priority given to studies that provided information for calculating organizational ROI. Despite their prevalence, we did not include materials that reflected organizational self-promotion/marketing or that did not contain adequate information about how cost savings or other benefits were realized. A particular effort was made to obtain information about work-life balance practices in SMEs, given their prevalence and the contribution they make to the Canadian economy.

2.1 Terminology and Framing Issues

We intend this report to be relevant to the wider set of issues and concerns that are embraced by the use of the term *work-life balance*, as that term includes roles that extend beyond paid work and caregiving for dependent family members. This broader frame is in keeping with viewing FWAs, telecommuting, leave arrangements and more traditional 'family-friendly' practices as strategic vehicles for achieving business goals, promoting employee engagement and commitment, enhancing employees' participation in a variety of roles, and supporting work-life balance. Much of the academic literature, however applicable to this broader frame, is rooted in and focuses on policies and programs that are designed to reduce WFC. Yet, FWAs, leave policies, telecommuting, compressed work

weeks and other work options are also used by employees who are not parents or caregivers and/or for purposes other than for accommodating work and care responsibilities. Such practices impact on employees' job satisfaction, performance and intentions to remain with their employer. Consequently, we summarize research and consider the ROI that applies to employees with and without dependent care responsibilities.

2.2 Characteristics of Research Studies and Business Reports on the Effects of Work-Life Balance Practices

Despite the centrality of this topic in the contemporary business and social environment, there is still a paucity of comprehensive, well-designed studies of the effects of work-life balance practices on employees and organizations, and even fewer reliable estimates of the economic ROI to organizations. Most studies collect data at a single point of time to examine the relationship between the use or availability of various work-life balance practices and employee attitudes and behaviours. Thus, while inferred, causal relationships are usually based on correlations. More rigorous studies use advanced statistical techniques based on modeling a causal sequence, but can still be challenged. The majority of studies are based on employee samples obtained within organizations that agree to participate. There is also a strong bias towards large organizations.

Studies based on large national datasets tend to investigate relationships between employees' access to, or use of various policies and services, their demographic characteristics (which serve as proxies for family demands), and a variety of measures including employees' job satisfaction, organizational commitment, stress and degree of WFC. These include the (US) *National Study of the Changing Workforce* based on survey data collected every five years, and large government-funded surveys of employers and employees, such as Statistics Canada's *Workplace and Employee Survey (WES)*. Although these large government-funded surveys of employers and employees are extremely valuable, there is often a considerable lag between when the data were collected and publication of research findings. For this reason, the most recent publications may be based on data collected 5 to 10 years ago.

Relatively few academic studies or reports of ROI include data obtained at more than one time to assess differences before and after a policy is introduced or used, or to determine longer-term impacts of policy use on employees' career advancement. Recent research conducted by Fang and Lee (2008)²⁰ based on WES data is an exception.

Research on organizational outcomes (e.g., reduced absenteeism, reduced turnover, cost savings, and profitability) was most often found in business and management journals or through specialty websites (hosted by consulting firms or member organizations). Surveys of employers and HR professionals based on membership in business organizations may reflect current views, but often are based on selective and biased samples. Still, other organizations use research to advance the business case for work-life

balance practices, drawing heavily on case studies that may not be generalisable. Unfortunately, we have found that many reports of ROI lack adequate information that would inform readers of how the estimates were derived, and what was and was not included in the analysis. Reports based on data about the availability and utilization of work-life balance practices within organizations which rely on internal records to estimate cost savings and organizational gains are often proprietary.

Recently, there have been a considerable number of ‘best employer’ lists and awards for businesses and organizations deemed to be exemplary on a number of dimensions, including their attention to work-life balance. While recognition of these award winners and press coverage of the benefits they provide helps create a climate that promotes greater acceptance of a range of work-life balance practices, detailed information about implementation, utilization and effects of the policies and practices used by these award winners generally is not available.

In her review of the impacts of diversity and work-life balance practices in organizations, Lobel states that “Research on impacts leaves much room for improvement in terms of quantity and quality. More research in all areas is needed to determine what degree of effectiveness can be expected within a given time frame, to give guidance on the development of practices, and to provide concrete evidence of success for cost-conscious critics” (1999, p. 472)²¹ This assertion clearly encourages efforts to determine the financial effects of diversity and work-life balance practices including organizational progress regarding cultural change and system flexibility.

Researchers have noted that organizational culture and supervisory support are key factors in accounting for the availability and effectiveness of work-life balance practices.²² Unfortunately, supervisory support is rarely captured in cost-benefit analyses. We note this because effective implementation is critical to outcomes. Moreover, supervisors’ willingness to learn how to manage under changing circumstances impacts organizational ROI. Research has also suggested that the most effective organizational responses to WFC and turnover are those that combine work-life balance policies with other HR practices, including commitment-enhancing incentives.²³ Although most of the research we reviewed focused on particular work-life balance practices as if they could be assessed independently of other work-life or HR practices, we note that the concept of ‘work-family/HR bundles’ – a group of complementary, highly related and in some cases overlapping policies – is consistent with strategic HR research and best practice.²⁴ Two contradictory views can be found pertaining to the effects of having both progressive work-life balance practices and another strategic approach – such as a focus on high performance/engagement. On the one hand, it has been argued that work-life balance practices are enhanced by and, in turn, support strategic HR efforts.²⁵ On the other hand, Bloom and Van Reenan (2006)²⁶ assert that when they co-occur, productivity is attributable to better management practices, with little additional effect attributable to work-life balance practices.

2.3 Challenges in Assessing the ROI of Work-Life Balance Practices for Employers

In addition to the challenges and opportunities for extending the research on work-life balance practices noted above, we would add several more.

2.3.1 Selection factors affecting availability and use of work-life balance practices

It is fairly common knowledge that certain factors determine which organizations are early adopters and offer a variety of work-life balance practices and which employees are most likely to have access to, and use work-life balance practices. Larger firms, unionized workplaces, firms that employ more women and larger numbers of professionals are more likely to offer more varied and more generous practices and family benefits.²⁷ Ferrer and Gagné (2006),²⁸ for example, found that the availability of flexible work hours, telecommuting options and practices for child and elder care in Canadian workplaces depends on firm size, industry and occupation, and technological constraints. They also identified a ‘mismatch’, where employees who could most benefit from child care and elder care practices had only limited access to them. Alternatively, there are employees who do not use work-life balance practices that are ‘theoretically available’, in part because they believe that doing so would jeopardize their career advancement.²⁹

Appreciating these selection factors is important because the academic and business literatures have often focused on large corporations that tend to offer a wider range of work-life balance practices to their employees, resulting in what may be an overestimation of the effects. Employers must consider the unique needs of their own workforce and the opportunities and constraints that may affect the uptake and effectiveness of new work arrangements.

2.3.2 Inconsistencies in analysis

It is also important to attend to what particular practices are being evaluated. Some studies use an aggregate of work-life balance policies and practices, while others focus on the effects of specific practices (such as employer-sponsored child care), whether other options are available to the same employees or not. There is also confusion in the literature because some researchers assess the effects of the availability of work-life balance practices, while others assess use.

2.3.3 Clarifying what we mean – How flexible are flexible work schedules?

It is important to appreciate the nature of various work-life balance practices to understand how and why they work – or don’t – and for whom. The term FWA in its broadest sense includes flexibility in work hours, work location, and work load. It may also imply a flexible career path with career breaks (leave) for childbearing, caregiving or education. A more limited view still comprises a range of meanings that include:

a) employees selecting an earlier or later start and end time around core times with little variation expected (the most common form); b) having a regular schedule, but being free to change start and quit times daily while present during core hours; and c) having even more flexible scheduling with the opportunity to take time off during a work day to attend to personal or family needs and/or to work from home as needed. In their meta-analysis of flexible and compressed work week schedules, Baltes, Briggs, Huff, Wright, and Neuman (1999)³⁰ concluded that in comparison to the most flexible option, employees with some flexibility were more productive and reported greater job satisfaction. Interestingly, our literature review suggests that managers and professionals generally have more personal autonomy and are less affected by formal flexible schedules than other employees. As well, many more employees experience flexibility on an informal basis than as a result of being enrolled in formal, employer-sponsored flextime programs. In such cases informal flexibility and supervisor support are likely to work together to enable employees to combine paid work and non-work activities without undue strain or penalty.³¹ These common, informal arrangements, while likely effective when they meet employees' needs and reflect supervisor support, are not represented in evaluation studies based on participation in formal workplace programs.

2.3.4 Complexity of findings

In larger data sets it is possible to examine whether work-life balance practices have the same effects for different employee groups. Such opportunities provide an opportunity to gain a deeper understanding, but make interpretation and application more complex. An example is found in Higgins, Duxbury and Lyon's 2007 study,³² "Reducing Work-Life Conflict: What Works? What Doesn't?" Different work-life balance practices affected women and men, managers and non-managers, and those with and without dependent children differently. Such findings suggest that a mix of work-life balance practices and supports may yield the greatest benefit for employers.

2.3.5 Choosing meaningful measures to assess impacts

Attempts to measure the ROI of work-life balance practices must reflect their intended objectives with respect to both the organization and the employee. While in some cases, relying on employee surveys is sufficient, more convincing and useful data will include external measures of employee performance, absenteeism, and retention. A particular challenge is assessing productivity or performance when there are no obvious products or service units that can be counted.

2.3.6 Appreciating implementation gaps and linking mechanisms

Implementation gaps are common, especially for new practices. Working out how reduced work loads, job sharing, or phased returns from leave will be managed and

evaluated is essential. Difficulties in communication and failure to monitor implementation problems can scuttle the desired positive impacts for all stakeholders.

2.3.7 Knowing how to attach financial values

Attaching financial values to costs, cost savings, and productivity gains is critical for calculating the financial ROI. Estimates of costs should be realistic, but inclusive, and the financial benefits of improved employee performance, reduced absenteeism, and greater organizational commitment assessed. While intangible impacts (more positive employee attitudes) may be difficult to quantify directly, an important 1998 study of the Sears Corporation confirmed the causal link between employee satisfaction, customer satisfaction and increased profits. Employees who were happy working for Sears had higher customer service ratings, which in turn led to increased profits – every 5 percent improvement in employee attitudes drives a 1.3 percent improvement in customer satisfaction and a .5 percent growth in store revenues.³³ This finding provided an important lesson for the work-life balance field by validating the link between the availability and use of work-life balance programs, increased employee satisfaction and a positive economic impact as a result of increased customer satisfaction. Today there is widespread appreciation of these linkages in service industries which further informs business practice, including employee training.

Further details about calculating ROI of work-life balance practices are included in Section 8 of this report. It is worth noting, however, that many organizations do not proactively consider how they will evaluate the ROI of work-life balance practices or how employee surveys, administrative records, health claims data and performance measures/organizational outcomes can be used for this purpose.

3. Work-Life Conflict: Its Antecedents and Consequences

Before one can understand the impact that work-life balance practices have on work-life conflict (WLC), it is first necessary to understand the nature of work-life conflict. WLC is a broader form of work-family conflict (WFC). WFC is a type of inter-role conflict that results when one's roles as an employee and spouse/parent/caregiver are incompatible with one another. WLC is affected by the demands experienced in each role and the resources available to enable successful performance in each role, as well as the capacity to manage competing claims on one's time and energy across roles. WFC is viewed as being bi-directional, involving role overload (difficulty coping with the demands of multiple roles), and conflict that results from work interference with family (WIF) as well as from family interference with work (FIW). The amount of conflict experienced due to WIF, however, is generally of a far greater magnitude than that experienced as a result of FIW.

The concept of WLC acknowledges the fact that most individuals have multiple roles. Not only do family roles go beyond those of spouse/partner, parent and elder caregiver to include relationships with other family members and close friends, it is also recognized that individuals may have other roles that are outside of the work and family domains (e.g., roles in community, cultural or religious organizations). Similar to WFC, these various life roles at times may be incompatible with one another and result in conflicts.

Work-life balance practices can exert an impact by: 1) directly reducing the amount of WLC itself, 2) by providing resources to reduce work and family demands, thus targeting the antecedents of WLC, or 3) by alleviating the negative outcomes of WLC. We discuss these various alternatives in later sections of this review. Here we set the stage by providing a brief review of the literature on the antecedents and outcomes of WLC, with an emphasis on contributions and consequences experienced at work, based in large part on extensions of the considerable research that has focused on work and family roles.

3.1 Antecedents of Work-Life Conflict

3.1.1 Job demands

Heavy job demands are one of the primary antecedents of WLC.³⁴ Having a heavy workload with multiple, competing tasks, or non-standardized hours, or doing work that is fast paced and time pressured increases job demands.³⁵ To cope with increased job demands, employees need to work long hours, take work home, work on weekends and vacations, etc., which results in job overload and conflict with other role responsibilities.³⁶ An example of the negative effects produced by heavy job demands comes from recent research on employees with non-standard work schedules, a situation that currently describes approximately 28% of employed Canadians, including many in health-related occupations and protective services, as well as employees in sales and service-related

occupations. Williams (2008)³⁷ reports that shift workers are significantly less satisfied with their work-life balance and more likely to experience role overload. This may be particularly problematic when employees have little control or choice in their work schedules. Strazdins, Clements, Korda, Broom and D'Souza (2006)³⁸ found that Canadian parents working non-standard schedules reported worse family functioning, more depressive symptoms and less effective parenting. Their children were also more likely to have social and emotional difficulties.

3.1.2 Job overload

Higgins, Duxbury and Lyons (2007)³⁹ report that the job overload that results from heavy work demands is related to increased:

- WLC and negative work-life spillover;
- Job stress;
- Poor physical and mental health, particularly anxiety, fatigue, burnout and depression;
- Greater use of Canada's health care system;
- Absenteeism;
- A higher probability of higher turnover (as well as decreased commitment and job satisfaction).

It follows from the above that work-life balance practices that are aimed at lessening job overload, overwork, and unrealistic expectations and providing employees with more control over the quantity of work they perform and the pace of work should have a beneficial impact on WLC and its consequences, as manifested at work and in non-work roles.

3.2 Consequences of Work-Life Conflict

WFC and WLC have been shown to have a number of detrimental consequences for individuals and the organizations for which they work. WLC has been associated with lower job satisfaction, organizational commitment and organizational citizenship behaviour; poorer mental and physical health; poorer morale and job performance; and increased tardiness, absenteeism, and turnover.

3.2.1 Job satisfaction, commitment, job performance and productivity

WLC has been found to be related to lower organizational commitment (a belief and acceptance of organizational goals and values, a willingness to exert extra effort for the good of the organization, and a desire to maintain organizational membership).⁴⁰ Although findings have been mixed, WFC has generally been linked with lower productivity and poorer self- and supervisor-rated performance.⁴¹

3.2.2 Mental/physical health symptoms and morale

According to Mullen et al.'s (2008)⁴² review of the literature, WFC has been associated with:

- Stress, anxiety and depression;
- Sleep disturbances;
- Infectious disease and suppressed immune functioning;
- Poor dietary habits, a lack of physical exercise, and obesity;
- Increased dependence on cigarettes, alcohol, medications and drugs;
- Hypertension, high cholesterol, coronary, musculoskeletal and digestive problems;
- Allergies and migraine headaches;
- Burnout;
- Increased costs for medical consultations and prescription drugs.

3.2.3 Tardiness, absenteeism, turnover intentions and turnover

Findings regarding absenteeism are very mixed, but generally support an association between WFC and increased absenteeism. The strength of the association is dependent upon the way absenteeism is measured and the gender of the employee.⁴³ There is also an association between WFC and increased tardiness and partial absenteeism. WLC is highly predictive of both turnover intentions and actual turnover.⁴⁴ A study of a random sample of employees in seven New Zealand cities, for example, found that about half of those who changed jobs did so due to a desire to improve their work-life balance.⁴⁵ By contrast, employees with less work-life conflict, who feel supported by their managers/organizations, are likely to stay with the organization for that reason.⁴⁶ Bachmann (2000)⁴⁷ cites two studies (one from the US and one from Canada) that indicate that management's recognition and support of work-life balance is a key driver of employee commitment.

3.3 Research on the Canadian Forces

Research conducted on members of the Canadian Forces demonstrates that WLC is an important issue for them as well (see Pickering, 2006⁴⁸ for a review). In the Canadian Forces, WFC has been found to be associated with:

- Job stress, burnout, and depression;
- Poor psychological and physical health;
- Visits to physicians and other types of health care professionals;
- Use of prescription drugs;
- Absenteeism due to poor physical and mental health;
- Absenteeism due to child care issues;

-
- Low job satisfaction and organizational commitment;
 - Turnover intentions and turnover.

Specifically, half of Canadian Forces members surveyed reported that they would leave in order to have more time for their family and personal life, 30% reported that they would leave in order to move closer to their family, and 33% reported that they would leave because of unrealistic work expectations.

3.4 Summary

In summary, a substantial amount of research has identified the major contributors to WLC as well as its consequences. Canadian researchers Duxbury and Higgins (2005)⁴⁹ affirm that work demands (long hours including unpaid overtime) and an organizational culture that focuses on hours, face-time, putting work ahead of family to advance are the strongest predictors of role overload and work to family interference. A combination of heavy demands and low control leads to job overload, WFC and WLC, a situation that has multiple negative consequences for employees as individuals, their families, and for their workplaces. The accumulated evidence of the negative effects of WLC has helped build the business case for work-life balance practices and for public policy development.

4. The Prevalence and Nature of Workplace Work-Life Balance Practices

Work-life balance practices are deliberate organizational changes in policies, programs or organizational culture that are designed to reduce WLC and enable employees to be more effective at work and in other roles. These practices are employers' responses to the increasingly complex and challenging circumstances faced by many employees that have been well documented in the work and family literature. Many of these practices started in response to the needs of working mothers or as accommodations to those with significant caregiving responsibilities. Today they are viewed as potentially advantageous to a wide range of employees in a diverse workforce and are considered as tools to achieve business goals as well as facilitating work-life balance. We also include in this category modifications to standard or traditional workplace arrangements, such as a compressed work week schedule or telecommuting/work at home arrangements that may be initiated by employers for purposes other than to support work-life balance, but may also be used to serve that purpose.

Work-life balance practices are often categorized in broad categories including:

- Flexible time and place;
- Reduced work hours, job sharing;
- Paid or unpaid leaves (typically maternity, parental or caregiving leaves), but more recently including educational and sabbatical leaves;
- Employer-sponsored child care and elder care practices.

In addition, employers may provide a range of benefits related to employees' health and well-being, including extended health insurance for the employee and dependents, personal days, and access to programs or services to encourage fitness and physical and mental health. Still, other practices may support children's education, employees' participation in volunteer work, or facilitate phased retirement. These additional practices fall outside the scope of our current review, but can be viewed as supporting employees' health, well-being, and work-life balance.

We focus particularly on policies, programs and benefits that are visible in organizations, although there is a fair amount of research that indicates that many employees benefit from informal arrangements with supervisors – a situation that is believed to be perhaps more common than formal arrangements and more valuable for reducing employees' stress and WFC.⁵⁰ Informal arrangements are known to be more prevalent in small businesses than in larger organizations.⁵¹

The literature we have reviewed provides information about the availability of work-life balance practices (based on employer reports) and information on employees' perceived access to and use of those practices that are available to them. Employers may extend

work-life balance practices to all employees, to those in certain departments or jobs within the organization, or at the manager's discretion to individual employees.

4.1 What Do We Know about the Availability and Use of Work-Life Balance Practices?

4.1.1 Canada – Large Organizations

The most current information available pertaining to both availability and use of work-life balance practices in Canada is based on the 1999-2003 WES, which draws on a national sample of employers and a sub-sample of employees within those organizations. The survey excludes the Territories, a few specific industries and government services at all levels. (See Box 1 for more details on the WES).

Analyses of WES data by Ferrer and Gagné (2006)⁵² indicate that in 2000-2001:

- Flexible work hours (the capacity to vary start and stop times around a certain number of core hours) were available to 54% of female employees and 58% of male employees. Roughly two thirds of employees used this option when it was available – 35% of women and 39% of men;
- Telework (paid work performed at home for at least some of one's regular scheduled hours) was available to approximately 11% of both men and women and used by just under 6%;
- Family support (support provided by an employer pertaining to child care or elder care or another type of family support) was available to 12% of employees and used by less than 2% of men and women. This category includes a mix of on-site child care, back-up care, and access to information and referral services.

Analyses of WES data indicate that 'family-friendly' workplace practices are often not available to or not used by parents and that there is, in fact, a 'mismatch' between what is available in particular workplaces and what would presumably be of more benefit to employees with dependent care responsibilities.⁵³ The reason for this mismatch in availability (discussed in more detail below) is that work-life balance practices depend more on characteristics of organizations than on characteristics of employees.

Fang and Lee (2008)⁵⁴ reviewed the WES data on employee use of several workplace practices and supports for each year between 1999 and 2003. Comparisons reveal only modest changes in the proportion of employees using specific work-life balance practices over this five year period. The percentage of sampled employees reporting use of flexible work schedules declined slightly from 39.2% in 1999 to 35.7% in 2003, while the proportion using a reduced work week option increased from 4.9% to 7.5%, and the proportion working a compressed work week increased from 3.7% to 6.6%. There was little change in the proportion of employees using some form of employer-provided child

care or elder care assistance (less than 1% at both points). Further, analysis of WES data by Tremblay, Najem and Paquet (2006)⁵⁵ found some differences between men and women and a few reflecting differential use patterns based on the number of children in the family. These authors also noted that most employees who work from home/telecommute cite work requirements as their reason for doing so. Less than 5% of women and less than 7% of the men who teleworked in 2002 did so for family reasons.

In a study of 301 organizations with more than 250 employees in Québec, Guérin et al. (1997)⁵⁶ found that the type and number of work-life balance practices that were offered were determined by four key themes: (1) a group of interrelated variables pertaining to an organization's unionization rate, industry membership and size, (2) organizational culture, (3) proportion of women in the organization, and (4) the type of workforce (low-wage workers, professionals, etc). The study concluded that implementation of such practices varied greatly between organizations depending on the above themes.

4.1.2 Canada – Small and medium enterprises

Although there is an extensive body of literature on work-life balance practices in Canada and the US, relatively few studies have focused on SMEs.⁵⁷ Lavoie (2004)⁵⁸ suggests that this gap may be due to a number of issues: the diversity of SMEs, their informal HR policies, differences in how they are defined between countries or the 'natural propensity' of researchers to focus on larger organizations. Furthermore, given a widespread perception that larger organizations are more likely to offer work-life balance practices more generally,⁵⁹ it is unsurprising that they have been the primary target for empirical research. Nonetheless, given that most Canadian businesses have less than 50 employees (and could therefore be classified as SMEs) there is a strong case to be made for more studies of work-life balance practices in this particular sector.⁶⁰

A CFIB study of 10,699 business owners between December 2003 and February 2004 (see Box 2, below, for more details on the CFIB study) provides one of the most useful sources of information by province, industry, business size and age.⁶¹ This study suggests that virtually all SMEs in Canada offer some form of flexibility in work practices – an increase from 2000 when 80% were reported to have adopted flexible work practices as a means of supporting employees' work-life balance.⁶² Indeed, a study conducted by the Centre for Families, Work and Well-Being (CFWW) at the University of Guelph of 300 Canadian companies with fewer than 100 employees suggests that small business owners accord a great deal of seriousness to work-life balance practices.⁶³ Reports in the business press offer a similar perspective suggesting that small organizations are just as capable (if not more) as large organizations of providing work-life balance practices.⁶⁴ The most common forms of flexibility reported in the CFIB and CFWW studies were being able to schedule vacations, take time off to deal with personal issues and having access to flextime. In the CFIB study, more than half of small businesses

offered flexible work schedules and about a half offered flexibility specifically to cater to child care needs.

4.1.3 US studies

Much of the research on work-life balance practices is conducted in the US. The Families and Work Institute conducts a periodic *National Survey of Employers* and an extensive *National Survey of the Changing Workforce* every five years. The 2008 *National Survey of Employers* reported that:

- 79% of employers allow at least some employees to periodically flex their arrival and departure time;
- 47% of employers allow at least some employees to shift from full-time to part-time work and back again while remaining in their same position;
- 9% of employers provide on or near-site child care; 35% provide information and referral services and almost half enable employees to pay for child care with pre-tax dollars under the provisions of a Dependent Care Assistance Plan.⁶⁵

Notable trends in employers' provision of work-life balance practices over the last 10 years are that more employers permit some flexibility in work scheduling, but that fewer employers allow employees to shift from full to part-time and back again within their position. (This option may be particularly helpful to new mothers and those experiencing particularly heavy family demands). There was no major increase or decrease in the proportion of employers offering some form of child care assistance; however there was a fairly strong increase in the proportion of employers who provide access to information about services for elderly family members (from 23% in 1998 to 39% in 2007).

Data on US policies also include information about paid caregiving leave and health care insurance coverage – two areas in which employer provision is extremely important, especially for low wage employees who generally lack access to other forms of health related benefits.

Information pertaining to employees' use of flexible work schedules and other workplace programs is collected in a separate survey and shows a remarkable gap between what appears to be widespread availability and actual use. The 2002 *National Survey of the Changing Workforce* (the most recent available) found few changes in the proportion of employees using specific work-life balance practices over the previous decade. There were two exceptions: an increase in the proportion of employees who could flex their start and stop times or vary their daily work hours and the proportion of employees reporting access to and use of workplace provided elder care information services. Fewer than 10% of employees surveyed had access to employer-sponsored child care information

and referral services and less than 0.2% reported using an employer-sponsored or operated child care centre.⁶⁶

Despite signs of increased support from supervisors and somewhat more control over their work schedules, a telling finding from the survey was that a higher percentage of employees in 2002 than in previous surveys reported experiencing ‘some’ or ‘a lot’ of interference between their jobs and their family lives.

The focus on US workplaces as providers of paid and unpaid leave, child care, time off work when a family member is ill, and other workplace benefits is particularly important given the limited public policies that exist in these areas.⁶⁷ For better or worse, employers play a major role in facilitating or impeding access to the resources most needed to balance competing work and family roles.

4.1.4 Europe

Below we provide information about work-life balance practices in Continental Europe and the UK. However, we do so with some caution because our review has indicated that cross-European comparisons are difficult. First, the European labor market is characterized by diversity and inequality. The economic level is higher in the West than in the East and in the North than in the South. The unemployment rate also varies from country to country.⁶⁸ Second, although work-life balance is an EU policy priority, within Europe there are considerable variations in the nature and extent of supports offered by national governments.⁶⁹

Thus, there are a wide variety of legislative policies impacting on the provision and utilization of public policies in each of the respective countries. Moreover, even where general EU directives are in place, how each country responds to them may vary, in part due to national and cultural values and in part because the presence or absence of institutional processes such as sector-wide bargaining affect the feasibility of introducing work-family policies and practices in the workplace.⁷⁰

Thus, for example, Spain and Portugal can be described as ‘familialistic’ welfare regimes which locate caring responsibility in the private domain.⁷¹ Likewise, Den Dulk, Van Doorne-Huiskes and Schippers (2001)⁷² classify Italy as a ‘corporatistic’ welfare state, where the family is an important provider with very little government support. By contrast, Sweden, Norway, Finland and Denmark have been described as ‘encompassing’ welfare states, which are characterized by gender egalitarianism and generous levels of universal welfare support.⁷³

It is also notable that the development of work-life balance practices and the respective stakeholders impacting on that development has varied considerably.⁷⁴ For example, the development of work-life balance practices in France began in the 1970s and was heavily

influenced by government policy, an employment crisis and the need to increase economic productivity, amongst other things. Conversely, the development of family-friendly policies in the UK in the late 1990s was influenced by the election of the ‘New Labour Party’, labour shortages, cash and tax benefits encouraging individual care and EU pressure.⁷⁵

According to European Diversity Research & Consulting⁷⁶ the most frequently implemented work-life balance programs in Europe are:

- Part-time work (employee) 97.4%
- Flexible start and finish times 94.8%
- Flexible break times 93.0%
- Phased out/phased in part time 88.7%
- Health checks 81.8%
- Part-time work (managers) 81.7%
- Seminars (stress, time) 80.9%
- Telecommuting 76.5%

However, the uptake of these work-life balance practices varies widely from country to country. For example, the proportion of employees engaged in telework is highest in Finland, Denmark, Sweden and the Netherlands and lowest in Italy, Portugal and Spain.⁷⁷ Other research shows that the European countries with the most generous work-life balance practices (e.g., Sweden) have highest employment rates for both women and men.⁷⁸ However, the European countries with the highest female employment rates (e.g., Norway, the Netherlands) also have the highest proportion of women working part-time.⁷⁹

Because in the EU work-life balance practices are often considered to be government mandated entitlements, their effects are seldom evaluated in terms of ROI. However, research does indicate that the European countries in which employees are given more time off for family-related issues do not have lower national productivity per hour worked than does the US where employees are granted less time off for family concerns.⁸⁰

Below we address the provision of work-life balance and/or family-friendly policies in some specific European countries.

4.1.4.1 Switzerland

Hürzeler (2005)⁸¹ collected data from 20 Swiss employers in the Basel region of Switzerland. Results indicated that for organizations who had implemented family-friendly workplace practices, the rate of return to work after maternity leave was

expected to increase from 80% to 90% and the percentage of mothers returning to full-time work after maternity leave was expected to increase from 49% to 80%. In addition, the proportion of positions filled through internal recruitment was anticipated to increase from 31% to 35% resulting in a decline in recruitment costs to 94% of their typical value.⁸²

The data indicated that the costs to organizations for implementing work-life balance practices are generally low and the ROI (savings minus implementation costs) was in the order of 8%.⁸³ However, the data were aggregated over employers and neither the aggregation method nor the economic model used to make the ROI calculations was included.

Among the challenges facing Swiss companies wishing to improve their work-life balance are difficulty staffing extended hours of operation, accommodating requests for weekend or night work, the need to provide expensive machinery and infrastructure, the close cooperation needed between employees, the difficulty back-filling certain employees (e.g., executives and communications sector staff), matching the available workforce to fluctuations in the volume of work (predictable or not), and unforeseen changes in the company.⁸⁴

4.1.4.2 The Netherlands

The *Modification of Working Hours Act*, passed in 2000, gives employees in the Netherlands the right to modify their work hours.⁸⁵ This has given rise to a range of innovative work schedules which employers can only refuse to grant on the grounds of sound business reasons.⁸⁶ Research shows that Dutch employees, especially women, prefer to work fewer hours even though it results in less pay⁸⁷ and as a consequence, a very high proportion of Dutch mothers work part-time.⁸⁸

A survey of employers in the Netherlands⁸⁹ indicated that they believed that work-life balance practices benefited them by increasing employee satisfaction and their ability to attract employees. However, they did not think that employee health or productivity had improved as a result of work-life balance practices. In terms of the costs of such practices, although the direct costs associated with the provision of child care facilities were mentioned infrequently, about half of the organizations surveyed referred to the high costs of replacing employees on leave or to costs incurred through having to coordinate greater numbers of part-time employees.⁹⁰ By contrast, Rosendaal (2003)⁹¹ points out that a part-time workforce has the potential to save employers money because part-time employees can be brought in only when needed and they are often paid lower wages. Furthermore, absenteeism is lower among part-time workers, although turnover is higher.⁹²

4.1.4.3 Scandinavia

Recent efforts in the Nordic countries (e.g., Sweden, Norway, Finland and Iceland) to promote equal sharing of child care responsibility between parents have resulted in increases in fathers' take-up of parental leave.⁹³ In Sweden, two thirds of companies encourage men to take paternity leave⁹⁴ and fathers of children born in 2002 used an average of 35.5 days.⁹⁵ Evidence from Scandinavia suggests that if gender-equal reforms are designed for both men and women, with a fair level of wage compensation and cultural support, most men will use them.⁹⁶

Research has shown that work-life balance practices in Finland and Norway have had a positive impact in reducing levels of WLC in these countries.⁹⁷ Moreover, employees in Scandinavian countries score higher on a variety of measures assessing the quality of work tasks and participation in organizational decision-making.⁹⁸

A study of 18,366 Finnish employees, covering 1,647 occupations,⁹⁹ indicated that negative work-family spillover was a significant predictor of medically certified sickness absence for both women and men. This was particularly true for blue-collar and lower white-collar women and men, as well as upper white-collar women who had young children (even when they were allowed to stay home to care for their ill children without recording it as sick leave).¹⁰⁰ These findings imply that work-life balance practices that reduce negative work-family spillover can lower the direct and indirect costs of absenteeism and result in increased work productivity.¹⁰¹

4.1.4.4 Spain

Poelmans et al. (2003)¹⁰² suggest that the provision of work-life balance practices in Spain reflects the country's 'familialistic' welfare regime and national culture which views caring responsibilities as a 'private responsibility' rather than the responsibility of the state. This has meant that provision of work-life balance policies in Spain is much more limited than in other European countries with more active public policy such as France's 35 hour work week, Finland's time-banking policies, Sweden and Denmark's extensive parental and paternity leave policies and many European countries' well-developed child care systems. The UK with its recent legislation for the 'right to request' a FWA is discussed elsewhere in this report. According to Aybars (2007),¹⁰³ Spain did not begin developing 'family-friendly' policies until the 1990's compared with Denmark and France which began theirs in the 1960s and 1970s, respectively. Moreover, it is notable that the primary influencing factors in Spain were pressure from the EU, rapid, recent increases in women's labour participation and sharply falling fertility rates rather than a 'cultural' or 'political' buy-in. It is also notable that the view of women as primary carers dominates in Spain¹⁰⁴ and impacts on both provision and take-up of the respective programs. Thus, for example, a European Commission report indicated that 95% of Spanish fathers said they had not and were not thinking of taking parental leave.¹⁰⁵

In addition to acknowledging the impact of public policy, in a study of 131 Spanish, mostly private firms, Poelmans et al. (2003)¹⁰⁶ found that the adoption of family-friendly policies in Spain can be explained by the firm's employment strategy, the percentage of female employees, and firm size, which reflects the findings in the US and Canada noted earlier in this report. Specifically, they found that larger companies and those employing more women were more likely to offer family-friendly policies, as were those companies with a 'high commitment work system' and operating in a 'tight' labour market. The inference that organizations in Spain may be using work-life balance practices as a 'recruitment tool' or incentive is notable.

In a study of the use of telecommuting in 479 SMEs located in Galicia, in North-West Spain Martinez-Sanchez, Perez, de Luis Carnicer and Vela Jimenez found that introducing more flexible work practices "may be costly in the short run, but it gets easier over time" (2005, p. 55).¹⁰⁷ Specifically, they suggested that incorporating telecommuting as a type of flexible work enhances performance by increasing overall organizational flexibility, thus creating a 'self-reinforcing process' where "because such firms are flexible, they are assigned varied and quick-response work, which in turn makes them still more flexible"¹⁰⁸ Having said that, it is notable that the authors acknowledge that their study argues for 'association' rather than 'causation', suggesting that the use of telework may "reinforce the impact of other flexible workplace practices on firm performance."¹⁰⁹ The study also found that firms using telework are also more likely to use other forms of flexible work practices and exhibit more employee involvement in organizational work practices. They also suggest that "firm performance is positively related to the use of teleworking, flexitime, contingent work and spatial decentralization" and conclude that "the contribution of teleworking to firm performance is very significant, which suggests that teleworking can increase organizational flexibility and generate sustainable competitive advantage."¹¹⁰

4.1.4.5 France

Work-life balance policies in France are very well developed. Indeed Aybars (2007)¹¹¹ suggests that along with Denmark, France is one of the 'pioneers' of family-friendly measures.¹¹² Commencing with a primary focus on facilitating and supporting working women, France expanded its legislative policies to cover broader themes including a 35-hour maximum work week, paid paternity leave and caregiver allowances. However, according to Roberts (2007),¹¹³ the 35-hour work week was introduced in 1998 primarily to save or create jobs rather than to achieve work-life balance given that unemployment was 12.5%. Moreover, the uptake on work-life balance provision in France is primarily by women. According to Fagnani and Letablier (2005)¹¹⁴, fathers' participation in parental activities is still very limited. Thus, for example, one out of two or three women who are eligible take-up subsidies provided for parents caring for their children themselves compared with one out of every one hundred men.

4.1.4.6 UK

A Department of Trade and Industry (DTI) study of 1,507 managers noted that employers in the UK are more likely to provide ‘bundles’ of work-life balance practices.¹¹⁵ The same study also reported that small workplaces in the UK (with less than 25 employees) are less likely to provide such practices than larger organizations, which also tend to offer greater diversity in the use of such practices. This trend may partially explain the paucity of literature on the provision of work-life balance practices in SMEs in the UK.¹¹⁶ The DTI study also suggested that provision of work-life balance practices in the UK was higher in the public than the private sector and that construction, manufacturing and transport, storage and communication stand out as industries where provision of work-life balance practices is very low.¹¹⁷

4.1.5 Japan

The combination of an ageing workforce and a falling birth rate led Japan to encourage the establishment of flexible work-life balance practices.¹¹⁸ Arrangements must be formally agreed between the employer and union. In one version, employees work a required number of hours each month, but set their own daily working hours within certain time parameters. A more popular choice, however, is the averaging of weekly working hours, with maximum average daily and weekly working hours set over a period of up to one year.¹¹⁹ About 36 % of Japanese firms adopted the system within three years after it was first implemented in 1999 and employers clearly perceived its potential advantages.¹²⁰ Moreover, research indicates that Japanese companies that are more family-friendly have higher than average profits/head and higher productivity.¹²¹

4.2 Employers’ Reasons for Introducing New Policies

Ongoing surveys by consulting firms and business groups track which factors most influence employers to provide or expand workplace work-life balance practices. Recent surveys by such organizations suggest that the key drivers for employers are:

- To attract and retain employees;
- To support work-life balance;
- To improve employee morale.

Other important reasons, of course, relate to cost savings, and the reputational benefits that accrue from community recognition, as well as a sense that ‘it is the right thing to do.’ However, Lee-Gosselin (2005)¹²² also suggests that many employers are not entirely ‘committed’ to work-life balance practices, citing evidence such as not exceeding the minimum obliged by law, providing such practices to only a select number of employees, limiting information about the availability of such practices and ignoring employees’ ‘real’ needs.

4.3 Factors Affecting Access to Work-Life Balance Practices

Various studies have examined what factors are associated with differential access to and use of work-life balance practices. Research conducted in the US, Canada, Australia and by the Organisation for Economic Co-operation and Development (OECD) consistently identifies firm characteristics as the most significant factors affecting the availability of work-life balance practices. In particular, more developed work-life balance practices are evident in:

- Larger organizations;
- The public and non-profit sectors;
- The financial and professional services sectors (and least in construction and in retail);
- Workplaces that have more women, more professional women, and more women and minorities in senior positions.

Interestingly, the 2008 *National Survey of Employers* in the US suggests that unionized workplaces are less likely to provide flexible scheduling options, but are more likely to provide more generous caregiving leave benefits.¹²³

4.4 Factors Affecting the Use of Work-Life Balance Practices

As noted previously, substantially fewer employees use work-life balance practices than would be expected based on what is reportedly available to them. The underutilization of practices that are intended to reduce conflict and stress and lead to more work-family balance is a problem for employees and organizations. Indeed, uptake or utilization is a critical factor to consider when evaluating usefulness and estimating organizational costs, as is employees' satisfaction with the amount of control or choice they have, or the quality of a service provided by their employer.

In some cases, an employee may not be aware that a work-life balance practice is available or, if aware, may not need or want to use it. More serious are reports indicating that employees who would otherwise be interested in using a flexible schedule, taking a period of leave, or reducing their work schedule may decide not to do so because their supervisor is unsupportive and/or they fear that taking advantage of a 'family-friendly' policy would have negative consequences for their career.¹²⁴ McDonald, Brown and Bradley (2005)¹²⁵ have identified five explanations for the provision-utilization gap including:

- Lack of managerial support;
- Perceptions of negative career consequences;
- Organizational time expectations (expectations for long hours);
- The gendered nature of policy utilization;
- The degree of co-worker support.

Among these possibilities, the first three are all indicative of an organization's work-family (or work-life) culture.¹²⁶ Lee-Gosselin (2005)¹²⁷ also draws attention to the potential impact of organizational culture, suggesting that employers should work to transform their organizational culture so that accommodation of employees' non-work lives is the norm rather than the exception. Moreover, there is evidence that lack of managerial support and an unsupportive workplace culture are contributors to WLC, affective commitment to the organization, and intention to leave.¹²⁸ For these reasons and to ensure that investments in work-life balance practices are realized, it is important to pay attention to implementation issues and to ensure that managers are trained and supported and that employees are aware of and enabled to use the practices that have been introduced without undue negative consequences for their career progress.

Ryan and Kossek (2008)¹²⁹ have identified the following criteria for assessing implementation attributes that affect both the utilization of work-life balance practices and the creation of a culture that is inclusive and supportive of employees' diversity and multiple role commitments:

- Supervisor support for use of work-life balance practices;
- Work-life balance practices that are universally available across departments, jobs and locations;
- The degree of negotiation required to obtain access to work-life balance practices and the perceived fairness of those negotiations;
- The quality of communication regarding work-life balance practices.

4.5 The Policy Context

In addition to firm or workplace characteristics, public policies provide an essential context that influences what employees are entitled to or have access to as citizens and as employees. In countries that have more developed labour standards and provisions for paid maternity and parental leave, there is less reliance on the employer. In these cases, while work-life balance practices provided by the employer may enrich or extend health benefits or top-up or extend parental leave benefits or the duration of job-protected leave to which employees are entitled, Canadians are not as dependent on their employers for paid sick days, minimum vacation entitlements, or the right to caregiving leave as are employees in the US. These fundamental policy differences influence the rights, responsibilities and prerogatives of employers and lead to different degrees of tension about the availability of work-life balance practices. Even within Canada, there are important differences between jurisdictions in labour legislation and in other social policies (including child care) that can influence employees' need for support from employers in reconciling work, family and other roles.

A particularly interesting development in the last few years is the introduction of legislation in the UK and elsewhere that provides employees with the 'right to request'

flexibility in accommodating work and family responsibilities.¹³⁰ The information reported below suggests that this policy approach has considerable promise both for accommodating the needs of working parents and for extending more flexibility to a wider range of employees

4.5.1 The UK and the ‘right to request’

In order to contextualize this part of the review, it is notable that government support and recent legislative changes have impacted on accessibility to work-life balance practices in the UK.¹³¹ It is also instructive to juxtapose legislating for the right to request flexible work hours in the UK with the ‘softer’¹³² approaches adopted in Canada and New Zealand which have promoted work-life balance practices by educating employers, employees and the general public rather than legislating for them. Since April 2003, parents with children under six and disabled children under 18 in the UK have had the legal right to apply for FWAs. From April 2007, the legislation was extended to those caring for adults. Although employers are not required to meet such requests, they are required to consider them seriously. Thus, the new legislation introduces “**the right to request flexible work and the duty to consider**” – indicating both the new right and its limitation. The impact of this legislation is reflected in a study conducted by the British Chamber of Commerce in April 2007 in which 72% of participating organizations were offering part-time work, 69% were offering variable hours, and 38% were offering opportunities to work from home.¹³³ However, the study also suggests that two in five employers are currently exceeding the legislation by offering the chance to work flexibly to all employees. It is also notable that other studies¹³⁴ conducted before the April 2007 legislation indicated that some employers were offering the right to request flexible work practices to all employees, i.e., not just to parents. Hayward, Fong and Thornton’s (2007) study¹³⁵ of 570 managers also noted that 92% said they would consider a request for flexible working hours from any employee. This trend moves away from figures reported in an earlier DTI study¹³⁶ indicating that 56% of employers surveyed had never considered flexible working locations and 57% had never considered offering opportunities to job share.

BOX 1**Access, Use and Outcomes of Family-Friendly Benefits and Practices in Canada
Findings from the *Workplace and Employee Survey (WES)* ¹³⁷
Survey of 6,322 Workplaces and 23,540 Employees 1999-2003****Key Questions:**

What proportion of Canadian employees have access to and use alternative work arrangements (flexible work schedules, telecommuting, compressed work week) and employer-provided support related to child care or elder care?

What effects does use of one or more of these work-life balance practices have on employees over time?

Sample and Descriptions:

This is a linked data set consisting of employer and employee components that allows researchers to investigate how employees' access to and use of a variety of work-life balance practices relates to employee and workplace characteristics. Excluded are business locations in the Yukon, Nunavut and Northwest Territories; agriculture, fishing, government services and religious organizations. This is a longitudinal survey repeated for six years in the same business locations with two-year rotating panels of employees.

**Findings:
In 2000-2001**

Flexible work hours were available to 54% of female employees and 58% of male employees. Roughly two thirds of employees used this option when it was available – 35% of females and 39% of males.

Telework was available to 11% of employees and used by just under 6%.

Family support (support provided by an employer pertaining to child care or elder care or another type of family support) was available to 12% of employees and used by less than 2% of men and women.

There is a 'mismatch' between availability of alternative work arrangements and family-friendly benefits. Many employees with children or dependent care responsibilities do not have access to work-life balance practices because organizational characteristics (firm size, industry) determine what is available. Many employees who have access to work-life balance practices do not need or want them. Many who could benefit do not have availability.

Use of one or more FWA in 2003 was associated with higher job satisfaction, as was use of dependent care support, particularly among men.

Longitudinal analysis suggests some gender differences in the effects of using work-life balance practices. For men, use of one or more practices and use of a compressed work week was associated with more promotions and use of one or more practices and a flexible work schedule was associated with lower rates of quitting. Among women, higher job satisfaction and a lower quit rate was predicted by use of one or more practices and use of a FWA. Compressed week employees also had lower quit rates. Use of dependent care supports was associated with job satisfaction for the full sample.

BOX 2**The Third Work-Life Balance Employer Survey (WLB3)
2007 – UK ¹³⁸****Objectives:**

This study sought to monitor changes in awareness, provision, uptake and demand for work-life balance practices and employers' perceptions of benefits and challenges since WLB1, 2000 and WLB2, 2002/2003, to provide a baseline for future evaluation following the *Work and Families Act 2006* and to examine other work-life balance issues, including differentials in provision and uptake.

Sample:

The sample consisted of British workplaces with five or more employees, using a random sample of 1,462. Larger workplaces and certain industry sectors were over-sampled. The survey was carried out between March and August 2007 and there was a response rate of 39%. Telephone interviews were conducted with managers with day-to-day responsibility for personnel and employment relations.

Key Findings:**Availability:**

95% of employers/managers provided at least one form of FWA. 85% said at least one FWA had been used in the previous 12 months. Reported availability had increased since 2003 e.g., reduced working hours 74% up from 40%, compressed working hours 41% up from 19%, job sharing and flextime 59% up from 39% and 55% up from 38%, respectively, working from home 26%, up from 22%. 4% had no FWA, primarily due to incompatibly with business activities.

Uptake:

There was less increase in uptake than availability. Part-time work was most widely used (79%). Increases in job sharing and flextime flattened to 15% and 25% between 2003-2007. There was a decrease in working from home from 22% in 2000 to 15%.

* Uptake was higher in workplaces with more female than male employees for all FWAs.

General Attitudes:

92% said most employees work best when they can balance their work and non-work lives, 67% said everyone should be able to balance work and non-work lives. Yet, 73% said employees should not expect to be able to change their working pattern if it disrupts business. 67% said it is not easy trying to accommodate employees with different working patterns. Positive attitudes towards work-life balance were strongly associated with having a broad range of practices in place.

Effects of FWA on Employee Relations, Motivation and Commitment, Recruitment, Turnover, Productivity and Absenteeism:

Fewer employers reported positive effects (40%), but more reported no effect since 2003 – maybe because FWAs are now embedded in organizational processes, so positive effects are now less apparent.

Effects of legislative changes extending maternity leave and pay, introducing paternity leave and pay and extending the right to FWAs:

12% said that changes had been beneficial, 18% said they had been detrimental. 65% said they had made no difference to operating costs, 28% said they had increased costs. Managers in organizations with 100 employees or more were more likely to say regulations had increased their costs but that they were beneficial.

Conclusions:

Employers are still mostly positive about work-life balance practices. 92% would consider a request for FWAs from any employee. Most say implementation is complex and FWA should not be expected if they might disrupt business processes.

5. The Influence of Organizational Factors on the Effectiveness of Work-Life Balance Practices

The effectiveness of work-life balance practices depends on a supportive context that truly allows employees to make meaningful and useful choices.¹³⁹ Evidence of the importance of such factors as firm size, sector, unionized status, and the proportion of women in the workforce as influential factors associated with the availability of work-life balance practices was included in Section 4 of this report. In this section we describe how other important organizational factors affect WLC and the effectiveness of work-life balance practices. In particular, we describe the impacts of a family supportive organizational culture, perceived organizational support, supervisor support, co-worker support and attitudes towards gender roles.

The following factors impact on the effectiveness of work-life balance practices:

- The culture of an organization, particularly the degree to which it supports work-life balance and gender equity, affects the kinds of practices that are made available to employees.
- Organizational culture also affects the extent to which employees are supported to use work-life balance practices and the extent to which both men and women believe that use would have a negative impact on their career advancement.
- A workplace culture that is supportive or unsupportive of work-family balance and work-life balance also contributes directly to employees' experiences of WLC.
- Finally, all of these factors, operating directly and indirectly, influence employees' attitudes (job satisfaction, organizational commitment and intent to leave) – factors that ultimately impact directly on the organization's performance.

5.1 An Organizational Culture that Supports Work-Family Balance and Employees' Multiple Roles

Family supportive workplace cultures are work environments that support and value employees' work-family integration.¹⁴⁰ Similarly, organizations that have adopted a broader framework appreciate that employees may be involved in a variety of non-work roles and activities that provide personal meaning and enhance their well-being, enable them to develop new skills and be life-long learners, and to participate in voluntary and social activities that help build and sustain social cohesion and the vitality of communities. Organizational culture may either enhance or prevent participation in work-life balance practices. For example, Kossek and Van Dyne (2008)¹⁴¹ report that certain organizational norms (e.g., that face time is important and that to advance in one's career, employees must make it their first and often only priority) may inhibit the use of work-life balance practices, even when they are available. This may be because in non-supportive

workplace cultures, employees anticipate negative career consequences for using work-life balance practices.¹⁴²

By contrast, family supportive organizational cultures have been associated with an increase in use of work-life balance practices.¹⁴³ Moreover, employee perceptions that an organizational culture is family supportive are related to lower job stress and WFC and higher positive spillover between work and home, as well as to higher job satisfaction and organizational commitment and lower turnover intentions.¹⁴⁴ Indeed, in a study of organizations with more than 250 employees in Québec, Guérin et al. (1997)¹⁴⁵ reported that the most important impact of work-life balance practices was an improvement in job satisfaction.

In their summary of the literature and model of factors affecting the organizational return on work-life balance practices, Deares, Mulvaney, Sher, Anderson and Harvey (2008)¹⁴⁶ suggest that family-supportive organization perceptions and reduced WLC are the two key mechanisms that account for the impact of work-life balance practices on employee and organizational outcomes.

5.2 Perceived Organizational Support

Two of the most researched areas in the literature are the effects of organizational and supervisor support on WLC and use of work-life balance practices. In contrast to the definition of a family supportive workplace culture, perceived organizational support has been conceptualized as the general perception (not specific to work-family issues) that the organization values employees and is supportive of them. Perceptions of organizational support are often more closely related to the formal policies that an organization has in place to assist employees, whereas perceptions of supervisor support are often more related to the informal support that employees receive from their supervisors.

It is well established that organizational and supervisor supportiveness for work-family balance significantly influences employees' use of work-family balance practices and decreases their level of WFC.¹⁴⁷ Perceived organizational support also appears to have positive effects on employees' work behaviours. For example, Friedman and Greenhaus (2000)¹⁴⁸ found that professionals who viewed their organizations as supporting work-family balance reported working fewer hours while maintaining their performance outputs at previous levels.

In summary, perceived organizational support has been related to a number of beneficial employee outcomes, including:

- Higher job satisfaction;
- Higher organizational commitment over time;
- Lower job stress;

-
- Lower burnout;
 - Lower turnover intentions and turnover.¹⁴⁹

5.3 Supervisor Support

It is often left to the discretion of supervisors or managers in organizations to implement work-life balance practices.¹⁵⁰ Thus, for example a qualitative study of 88 employees working in the IT industry in Montreal found that immediate supervisors played a central role in determining whether a practice exists or not and to whom such practices are made available.¹⁵¹ Therefore, supervisory support, or lack thereof, can play a more significant role in use of work-life balance practices than the mere presence of such practices.

Managers can provide instrumental, informational and social support as well as giving employees more control and flexibility over their work situations.¹⁵² Supervisor support has been correlated with the availability and use of flextime and part-time work options¹⁵³ and the number of work-life balance practices employees use and reduced perceptions of time demands and career damage.¹⁵⁴ Managers' support and willingness to work with professionals who opt for a reduced work option was described as 'integral' to employee outcomes and to transforming organizational culture by Kossek and Lee (2005).¹⁵⁵ Managerial support has also been found to influence employee decisions both to utilize work-life balance practices and to remain in the organization.¹⁵⁶ In particular, supervisor support appears to enhance the retention of women following childbirth, especially when accompanied by attractive leave and gradual return to work options.¹⁵⁷

Research shows that employees with supportive supervisors have:

- Lower WFC and role strain;
- Lower depression;
- Fewer health symptoms;
- Higher organizational commitment;
- Higher job and career satisfaction;
- Lower absenteeism and turnover intentions.¹⁵⁸

Despite these encouraging findings, it appears that supervisors may not provide all employees with equal access to work-life balance practices. A study of 184 Canadian managers found that supervisors were more willing to grant alternative work arrangements to non-managerial than to managerial employees, to women than to men, and to employees with responsibilities for children compared to those who provide care and support for older relatives.¹⁵⁹

5.4 Co-worker Support

Co-workers can show both support and resentment towards employees who need work-life accommodations. Co-workers can provide support for each other by acting as confidants, giving information and advice, agreeing to work modifications (e.g., swapping shifts), facilitating telework, covering their co-workers' job responsibilities and concealing their family-related absences.¹⁶⁰

According to Warner (2008),¹⁶¹ co-worker support has a positive impact on organizational and individual outcomes such as:

- Emotional exhaustion, depersonalization, and lack of personal accomplishment;
- Role strain, work interference with family, work-family spillover, and difficulty managing work and home demands;
- Work stress, organizational commitment, job satisfaction and job performance.

However, co-workers are not always supportive towards colleagues who are trying to balance work and family responsibilities. Between 28% and 38% of employees report that they are negatively affected by the child care difficulties that their co-workers are experiencing.¹⁶² Moreover, a study that examined factors affecting opposition to use of work-life balance practice found that 40% of respondents said they would resent their employers' providing practices that did not help them directly and 16% would feel resentful if they had to perform additional work to accommodate their co-workers' family and personal commitments.¹⁶³

Co-worker backlash often occurs when co-workers to whom policies do not apply or those without children perceive that they are more likely to be asked to work on weekends or overtime or believe they are being treated inequitably.¹⁶⁴ Both the form and the intensity of how practices are used matters. Kossek and Van Dyne (2008) feel that place flexibility (the location of work) has a more dramatic effect on negative co-worker reactions than either time or timing flexibility. Light intensity users of time and place flexibility provoke less severe reactions than heavy intensity users.¹⁶⁵

Although Smith and Gardner (2007)¹⁶⁶ found no association between co-worker support and the number of work-life balance practices used by employees in a New Zealand study, Kossek and Van Dyne (2008)¹⁶⁷ suggest that co-worker resentment may play a role in pressuring employees into not using work-life balance practices despite the fact that their supervisors support the use of those practices.

Kossek et al. (1999)¹⁶⁸ surveyed 1,000 managers about three work-life balance practices: flextime, leave of absence, and part-time work. They found that when women managers had co-workers who used work-life balance practices, they were more likely to use those practices themselves. Similarly, Blair-Loy and Wharton's (2004)¹⁶⁹ examination of

519 employees in a large international financial institution found that heavy job demands and unsupportive work groups were the two most common contributors preventing employees from using the work-life balance practices offered by their employers. Research also has shown that employees often fear that using work-life balance practices will result in negative consequences for their career advancement and upset their co-workers.¹⁷⁰ Haar and Spell (2006)¹⁷¹ found that co-workers' negative attitudes towards colleagues' use of work-life balance practices significantly predicted turnover intentions.

5.5 Gender Perceptions

Work-life balance practices, the workplace culture, and supervisors and co-workers can reinforce traditional gender roles or provide an opportunity for men and women to find new ways to share earning and caring roles more equitably. Ostensibly gender-neutral policies that are not sensitive to differential effects of policy utilization on men's and women's earnings and career options can inadvertently reinforce inequalities. Thus, while women are the primary users of 'family-friendly' policies, they are also more likely to experience negative career consequences. A study by Judiesch and Lyness (1999)¹⁷² supports this perception. These authors found that employees who had taken a leave of absence received fewer promotions and smaller salary increases in subsequent years.

On the other hand, it is clear that many women would like to have access to part-time work, on-site child care and more flexible work options and that making such options available can have positive effects on job satisfaction, absenteeism, and intention to turnover, and ultimately on employers' ROI,¹⁷³ especially in workplaces that employ a higher proportion of women in their workforce, particularly professional women.

By contrast, in recent years more attention has also been given to the increasing involvement of fathers in their children's lives. Public policies that promote father involvement include designated paternity leave with a reasonably high rate of compensation. Yet even public policies and personal preferences are easily trumped by lack of support for men taking parental or paternity leave in the workplace. Manager support, co-workers' attitudes, and workplace culture clearly affect both men's and women's use of leave policies.¹⁷⁴

Work-life balance practices, as such, convey attitudes about families, family life and gender roles. A commitment to gender equality within a work-family frame can still perpetuate inequalities in the consequences of using such practices. The adoption of a wider perspective – that of work-life balance and respect for other non-work roles that are important to employees need not minimize the importance of family life. Potentially it can have greater payoffs for a wider range of employees.

5.6 Summary

In summary, a family supportive organizational culture, perceived organizational support, supervisor support, co-worker support, and attitudes towards gender roles are important organizational factors that influence employees' access to and use of work-life balance practices. They also contribute directly and indirectly to the effectiveness of work-life balance practices for employees and their organizations.

6. Outcomes of Work-Life Balance Practices: Employee Attitudes and Perceptions

In this section we review the effects of work-life balance practices on employee attitudes and perceptions. These include job satisfaction, organizational commitment, job stress, and turnover intentions. We also include information on physical and mental health symptoms and workplace relationships. To some extent, separating out employee attitudes and perceptions from employee behaviours and organizational outcomes is arbitrary, as the two are integrally linked. However, we conceptualize employee attitudes and perceptions as being mediators between WLC and the employee and organizational outcomes discussed in the next section of the report. Employee attitudes and perceptions are most often assessed through self-report and it is often difficult to attach dollar figures to them to input into cost-benefit calculations. However, they are critically important predictors of organizational success – and are particularly crucial at a time when employers are already experiencing challenges filling positions that require specialized knowledge and skills or retaining skilled employees.

Research on the effects of work-life balance practices on employees' attitudes and perceptions comprise about 80% of the studies we have reviewed. While employee attitudes and perceptions may be perceived as 'soft' data, there is strong empirical evidence of the link between employee attitudes, employee behaviour and organizational outcomes.¹⁷⁵ In particular, there is compelling evidence of the link between high levels of WFC and employees' commitment to their organization, job satisfaction, job stress, absenteeism, use of employee assistance programs (EAPs), prescription drug use and intent to turnover.¹⁷⁶ All of these factors, in turn, affect performance, direct and indirect absenteeism costs, costs associated with the loss and replacement of valued employees, customer satisfaction, and organizational productivity.¹⁷⁷

Employee attitudes and perceptions are most typically obtained through employee surveys conducted either by mail, telephone, or more commonly through a secure internet survey. The reliability of such data depends in part on whether it is being conducted by an external party so that employees can respond honestly without fear of repercussion. A list of the most commonly used measures is included in Table 2.

Table 2 – Employee Attitudes that are Commonly Assessed in Studies of Work-Life Balance Practices

Employee Attitudes
Job satisfaction
Satisfaction with specific aspects of work such as work schedule
Organizational commitment/ loyalty
Intention to turnover
Stress, morale
Perceived improvements in supervisor-subordinate relations
Perceived improvements in work group effectiveness
Depression, somatic complaints

Other measures may be obtained from managers or co-workers. While less commonly used in research studies, measures sometimes include:

- Managers’ perceptions of impacts;
- Supervisor ambivalence;
- Perceptions of supervisor-subordinate relations.

6.1 Work-Life Balance Practices in General or as Bundles

We first discuss the impact of work-life balance practices in general or as bundles on employee attitudes and perceptions. This will be followed by a review of the effects of specific types of practices.

6.1.1 Job satisfaction

Research from Canada and the US has shown that:

“There is a consistent relationship between access to or use of work-family policies ... and job satisfaction”.¹⁷⁸

Greater use of work-life balance practices over time predicts increased job satisfaction over time.¹⁷⁹ However, the results depend on context and vary as a function of the characteristics of the sample (e.g., gender, family status) and what aspect of the practice is under consideration (i.e., access to, use of or satisfaction with).¹⁸⁰

In Québec, in companies where work-life balance measures had been implemented, 42% of HR managers interviewed said that employee job satisfaction had increased, but 43% said that it was unchanged.¹⁸¹

6.1.2 Organizational commitment

Research from Canada and the US has shown that organizations that make work-life balance practices available to their employees are rewarded with higher levels of organizational commitment.¹⁸²

However, it is not the mere availability of the work-life balance practices that is important, but rather the degree of satisfaction with those practices¹⁸³ or the feeling that one is free to use them that is related to enhanced commitment.¹⁸⁴ Moreover, some research indicates that the effects may be a function of job type, gender, and marital status.¹⁸⁵

In Québec, in companies where work-life balance measures had been implemented, 35% of HR managers interviewed said that identification with the company had increased, but 54% said that it was unchanged.¹⁸⁶

6.1.3 Job stress and mental and physical health symptoms

Research from Canada and the US has shown that work-life balance practices can have a positive impact on job stress and health-related symptoms. Such findings suggest that work-life balance (or its counterpart, work-life conflict) not only affects productivity – it can also affect employee and taxpayer costs related to health expenditures.

Other studies suggest that the more work-life balance practices that were available, the fewer health-related symptoms participants report having,¹⁸⁷ and the presence of worksite supports results in lower self-reported stress symptoms.¹⁸⁸

Similarly, satisfaction with work-life balance practices predicted reduced job stress in a sample of Canadian professionals.¹⁸⁹ Satisfaction with work-life balance practices has also been associated with lower emotional exhaustion, a component of burnout.¹⁹⁰ Moreover, the results of another study indicated that the number of work-life balance practices used by working mothers with at least one preschool child in daycare was related to reduced role strain.¹⁹¹

Overall, access to work-life balance practices appears to be only slightly predictive of lower stress because choice impacts the results. As noted previously, the mere availability or use of work-life balance practices that are available may not be sufficient to produce important positive outcomes. Work-life balance practices must fit employees' needs and provide them with more control, flexibility and resources to meet the demands of multiple roles if they are to result in decreased stress and better physical and mental health.

“Employees who had an arrangement that they requested reported lower levels of stress and higher personal well-being than employees who were hired into or assigned their current work arrangement.”¹⁹²

6.2 Flextime

There is perhaps more research on the effects of flexible work schedules than any other work-life balance initiative, although one of the challenges in summarizing results across studies is that the term covers options that provide more or less daily flexibility to enable employees to respond to both predictable and unpredictable circumstances.

6.2.1 Job satisfaction

The effect of flextime on job satisfaction is highly variable. Some research indicates that there are positive effects.¹⁹³ In terms of research conducted on Canadian employees, the use of FWAs was found to be related to higher job satisfaction in two of the three Canadian Aging Research Network (CARNET) studies,¹⁹⁴ as well as in Fang and Lee’s (2008)¹⁹⁵ investigation using WES data.

A meta-analysis of 27 studies by Baltes et al. (1999)¹⁹⁶ found that flextime was significantly related to both enhanced job satisfaction and satisfaction with schedule. However, the positive effects dissipated over time and were greater for programs with less flexibility. Moreover, the effect was significant only for general employees and not for those in managerial positions or professional occupations.

6.2.2 Organizational commitment

Several studies from both the US and Canada have shown a positive association between flextime and organizational commitment.¹⁹⁷ Moreover, satisfaction with schedule flexibility was found to be associated with increased organizational commitment in a sample of employed parents from Hong Kong.¹⁹⁸ However, the results are often context dependent and can be stronger for non-managerial employees, women and those with family responsibilities.¹⁹⁹

6.2.3 Job stress and mental and physical health symptoms

Shinn, Wong, Simko, and Ortiz-Torres (1989) report that despite employees’ beliefs that greater flexibility would ease their burdens, formal FWAs had little effect on the perceived stress of working parents.²⁰⁰ Nonetheless, two Canadian studies have indicated that FWAs are associated with reduced job stress.²⁰¹ Moreover, in other studies, workplace flexibility has been related to better mental health, lower depression and fewer somatic complaints, and higher morale.²⁰²

6.2.4 Workplace relationships and turnover intentions

Flextime has been associated with perceptions of improved work group and superior-subordinate relationships.²⁰³ In the US and Canada, the extent of workplace flexibility and satisfaction with schedule flexibility have been found to be related to lower turnover intentions.²⁰⁴ Satisfaction with schedule flexibility was also found to be associated with lower turnover intentions in a sample of employed parents from Hong Kong.²⁰⁵

6.3 Flexplace/Telecommuting

The positive effects of telecommuting appear to be a result of factors such as increased control, increased ability to concentrate, increased self-efficacy and increased flexibility.²⁰⁶ Working at home for one to three days a week is the ideal. It maximizes the benefits of concentration and time for family, yet minimizes social isolation and loss of contact with co-workers and supervisor.²⁰⁷

6.3.1 Job satisfaction and organizational commitment

A study of four European countries (Iceland, Norway, Portugal, and the UK) found that telecommuting was positively associated with job satisfaction and organizational commitment.²⁰⁸ A meta-analysis of 46 studies in natural settings involving 12,883 employees demonstrated that telecommuting had beneficial effects on job satisfaction.²⁰⁹

6.3.2 Job stress and workplace relationships

A study of four European countries found telecommuting was related to reduced job stress.²¹⁰ Although employees reported positive effects on their relationships with others at work, their managers felt the quality of the relationships was unaffected and their co-workers saw the effects as negative.

A meta-analysis found that telecommuting was linked to decreased WFC and employee role stress. Although occasional or low levels of telecommuting had no detrimental effects on the quality of workplace relationships, high-intensity telecommuting (more than 2.5 days a week) accentuated telecommuting's beneficial effects on WFC, but harmed relationships with co-workers.²¹¹

6.4 Compressed Work Week

6.4.1 Job satisfaction

A meta-analysis of 11 studies found that those on compressed work week schedules reported higher job satisfaction as well as higher satisfaction with their work schedule.²¹²

6.5 Part-Time Work

6.5.1 Job satisfaction and organizational commitment

Results are extremely variable and depend on other factors such as gender, age, education, work schedule, type of contract and nature of the work.²¹³ Control appears to be the underlying mechanism. Employees on their preferred schedule and in permanent rather than temporary positions have more positive effects.²¹⁴

6.6 Employer-Sponsored Child Care and Emergency or Back-up Care

Research on this work-life balance practice confirms that it can be extremely helpful for those parents who use it, resulting in less stress, increased morale, higher job satisfaction and organizational commitment, as well as reduced absenteeism, and lower turnover.²¹⁵

While this practice is often seen as expensive for employers and is typically used by a small proportion of employees, it can be cost effective in the long-run as a result of decreased absenteeism, greater retention, and support for recruiting new talent as a result of more positive perceptions of the organization by employees and the public.

6.7 Leaves of Absence

The provision of liberal leave policies (maternity and parental leave, enabling employees to take time off when a family member is ill) appears to have a positive effect on both users and non-users, enhancing the organization's reputation and employees' organizational commitment, and serving as a tool to reduce mothers' attrition in the first year following childbirth.²¹⁶ These effects are particularly evident in countries where public policies do not ensure employees' rights to paid leave for these purposes.

6.8 Longer-Term Effects of Use on Employee Outcomes

There are very few long-term studies of the effects of using work-life balance practices on employees. A recent study based on data from the WES reports that at least one type of FWA or dependent care support (in a bundle of work-life balance practices) results in improved employee retention for both men and women, increased job satisfaction for women, and a higher rate of promotions for men.²¹⁷ Long-term studies of reduced work-load arrangements among professional employees in larger firms suggest that when well supported by managers and the culture of organizations, reduced load options need not affect professionals' promotions within firms.²¹⁸

6.9 Summary

In general, the research indicates positive effects of flextime, compressed work week schedules, telework/work at home options, and employer-sponsored on-site and back-up

child care on job satisfaction, organizational commitment, and intent to turnover. For example, Baltes et al.'s (1999)²¹⁹ review of 27 articles indicated that flexible work schedules favorably influenced productivity, job satisfaction, absenteeism and employees' satisfaction with their schedule, but did not seem to have an effect on self-rated performance.

These general statements notwithstanding, results vary across studies, type of work-life balance practice, and employee group (gender, job type [manager/professional or not] and employee's parental/caregiver status). Positive effects are particularly notable among employees in non-managerial/non-professional positions who often lack the autonomy managers and professionals may have in their daily work. There are several findings in the literature indicating that a moderate amount of flexibility available to employees produces more positive outcomes. Other studies²²⁰ reveal that employees who have flexible schedules (particularly women and parents) report reduced job stress, less depression and better mental health. Flexible work schedules are also correlated with both lower turnover intentions and less actual turnover, again, especially among parents.²²¹

Reports of negative effects are rare, which may reflect a bias in the literature. Several challenges may occur in implementing these policies successfully. These include ensuring full coverage of work hours, ensuring effective coordination and communication among staff, and managers' comfort and capacity to monitor employee performance.

7. Organizational and Employee Outcomes

In this chapter we review the effects of work-life balance practices on job performance and productivity, promotions and wages, tardiness and absenteeism, turnover, and recruitment. Academic research studies and reports in the business press on the organizational outcomes of work-life balance practices have tended to focus on those outcomes most critical to cost savings (reducing absenteeism, turnover and real estate costs), increased productivity, and enhanced organizational image. While there are many factors that affect organizational outcomes, a dominant theme in the literature is that work-life balance practices that effectively leverage employees' talents and commitment are important and powerful tools for organizational success.

The most commonly used measures of organizational outcomes include the following:

- Reduced costs – particularly those related to reduced absenteeism and turnover;
- Improved employee performance;
- High levels of customer satisfaction and customer service;
- Productivity/Profitability.

Much of the published literature on the organizational outcomes of work-life balance practices that promote the business case focus primarily on the benefits that accrue to large organizations, particularly those in the financial sector, pharmaceutical companies, professional consulting firms and high-tech firms such as IBM, AT&T and Sun Microsystems that are experimenting with a range of flexible and telecommuting options. By comparison, the literature on SMEs is much more limited. Reports in the business press and broader media present more varied coverage (although it still tends to focus on large organizations and lacks the detail and rigor of academic studies).

Evaluation studies may compare data obtained from employees before and after a new work-life balance practice or program is introduced; from comparable units or organizations that do and do not have access to the work-life balance practice being evaluated, or may obtain data from employees that incorporates questions about what they would do in the absence of current practices or supports.

Table 3 – Organizational and Employee Outcomes

Organizational and Employee Outcomes
Absenteeism – unscheduled days and long-term disability claims
Absenteeism related to dependent Care (a sick child, elder care, child care arrangement instability)
Actually looking for another position
Voluntary quit
Return to work following leave
Performance – objective indicators
Wage increases
Promotions, career advancement
Customer satisfaction and retention
Profitability, shareholder value

7.1 Work-Life Balance Practices in General or as Bundles

7.1.1 Job performance and productivity

Several research studies have reported a positive association between the availability or use of work-life balance practices and improved individual performance or self-rated productivity.²²² Likewise, the use of work-life balance practices has been linked to improved individual performance.²²³ However, in general, the relationship between measures of the availability or use of work-life balance bundles and performance is weaker compared to findings related to job satisfaction and organizational commitment.

- In Québec companies where work-life balance measures had been implemented, 24% of HR managers interviewed said that performance had improved as a result, but 62% said that it was unchanged.²²⁴
- In a longitudinal investigation of Canadian employees, greater use of work-life balance practices significantly predicted higher wages and an increased number of promotions over time after the effects of control variables had been accounted for.²²⁵
- Konrad and Mangel (2000)²²⁶ found a significant positive relationship between the number of work-life balance practices offered and firm profitability as a measure of productivity – a relationship that was stronger in firms employing high numbers of women.

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- A study of 732 medium-sized firms in the US, UK, France and Germany showed that those with better management practices had more work-life balance practices and this was associated with higher productivity.²²⁷

7.1.2 Tardiness and absenteeism

- Greater availability of work-life balance practices is associated with lower self-reported absenteeism and use of fewer sick days, but findings are stronger when specific work-life balance practices (flextime, emergency child care) are considered.²²⁸
- In Québec companies where a variety of work-life balance measures had been implemented, 21% of HR managers interviewed said that tardiness had decreased as a result, but 64% said that it was unchanged. For absenteeism, 15% believed it had increased, 17% believed it had decreased and 62% believed it had remained the same.²²⁹
- In a study of child care services of the National Bank of Canada, flextime at Hydro-Québec and the voluntary part-time work schedule offered at the Montréal Heart Institute, Haines (1995)²³⁰ found that the provision of daycare services by the employer did not lead to a decreased rate of absenteeism (although it did reduce staff turnover). The same study also found that the introduction of flextime at Hydro-Québec had only reduced absenteeism among executive staff. However, it was also reported that while the implementation costs of voluntary part-time work at the Montréal Heart Institute were practically nil; it offered the employer a \$23,559 benefit attributable to a decrease in absenteeism.

7.1.3 Recruitment and retention

- Several studies and reports in the media suggest that the number of work-life balance practices offered can play a role in attracting new hires and in reducing employees' interest in changing employers.²³¹ Studies that demonstrate lower turnover rates in highly trained professional staff generally indicate major financial cost savings as a result.
- A study of Canadian lawyers by Catalyst (2000)²³² indicated that for both men and women an environment that would allow them to balance their work and family lives was a top consideration in choosing their firm. Moreover, those who had negative perceptions about their firm's culture had higher turnover intentions. The cost of turnover was estimated to be \$315,000 per employee.
- While Haines's (1995)²³³ study of flextime at Hydro-Québec found that it had only reduced absenteeism among executive staff, the reduction in staff turnover made the practice's benefits superior to its costs as reportedly the total benefits to the employer (in 1994) were in the order of \$231,817 while its costs were \$49,846.
- A longitudinal investigation of Canadian employees demonstrated that even after controlling for demographic confounds, greater use of work-life balance practices was related to decreased turnover intentions over time.²³⁴

7.2 Flexible Work Arrangements and Flextime

In a study of flextime and telecommuting at six US companies²³⁵ it was found that:

- 65% of managers and 87% of employees reported that FWAs had a positive or very positive impact on quality of work;
- 70% of managers and 87% of employees reported that FWAs had a positive or very positive impact on productivity;
- 76% of managers and 80% of employees indicated that FWAs had positive effects on retention.

In one study of professional employees, workplace flexibility ranked as the most important retention tool ahead of salaries or stock options.²³⁶

7.2.1 Recruitment and retention

Although flextime is predictive of lower turnover,²³⁷ sometimes the effects appear to depend on contextual variables. For example, Rothausen (1994)²³⁸ found that satisfaction with the flexibility of job scheduling was associated with lower turnover among parents. And, in a study by Batt and Valcour (2003),²³⁹ access to flexible scheduling practices was predictive of lower turnover intentions more for men than for women.

7.2.2 Absenteeism

Baltes et al.'s (1999)²⁴⁰ meta-analysis of 27 studies indicated that flextime was associated with lower absenteeism. Furthermore, the introduction of a flexible time schedule is frequently associated with dramatic drops in absenteeism as reported by organizations.²⁴¹

7.2.3 Productivity and performance

- Although studies generally do not indicate any negative impacts on individual performance, there is some evidence to suggest that flextime might have null or mixed effects. FWAs are also associated with higher self-reported individual productivity.²⁴² Flextime has been found to result in improvements in the actual productivity and performance of individual employees.²⁴³
- A meta-analysis of 27 studies found that flextime was related to improvements in individual productivity, but not to self-rated performance.²⁴⁴
- FWAs have also been associated with better team performance.²⁴⁵ In the organizations sampled by Pruchno, Litchfield and Fried (2000),²⁴⁶ about one third of the managers reported that productivity was improved.

7.2.4 Wages and promotions

- In a sample of Canadian employees, Fang and Lee (2008)²⁴⁷ found a positive association between the use of FWAs and the number of promotions an individual received over time. This finding was significant for men but not women.
- According to Weeden (2005),²⁴⁸ there is a wage premium of 6%-11% for work-life balance practices such as flextime or being able to work from a flexible location. However, the positive wage differential associated with the use of flextime may apply to women, but not to men.²⁴⁹

7.3 Flexplace/Telecommuting

A recent survey conducted by the Computing Technology Industry Association (Comp TIA, 2008)²⁵⁰ reported that two thirds of companies believe telecommuting has led to greater productivity, lower costs and better recruiting and retention. The same study also reported that nearly 40% of companies believe they have access to more qualified staff as a result of their telework program: 37% said telecommuting helped improve employee retention and 60% reported cost savings.

7.3.1 Productivity and performance

According to a review of the literature,²⁵¹ many studies show that telecommuting is associated with self-reported increases in productivity as a result of less time traveling and greater ability to concentrate; however, these results may be confounded due to the biased nature of self-report data. A study of four European countries supports this.²⁵² Employees self-rated their job performance as having improved as a result of telecommuting. However, their managers perceived men's performance to be unaffected and women's performance to be worse.

7.3.2 Absenteeism

Employees reported that the ability to telework allowed them to reduce their rate of absenteeism.²⁵³

7.3.3 Recruitment and retention

Meta-analytic results have demonstrated that telecommuting has beneficial effects on turnover intentions.²⁵⁴ This finding, however, appears to be at least partially mediated by perceived greater autonomy. Moreover, the ability to telework on a flexible schedule was considered an important aspect for employees considering choosing a new employer.²⁵⁵

- Flexible schedules also appear to be particularly important for new mothers. Retention is higher when mothers are allowed to work at home after childbirth.²⁵⁶

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- An interesting study by Golden (2007)²⁵⁷ however, found that the non-teleworking co-workers of employees who frequently telecommuted, were highly dissatisfied with their telecommuting colleagues and reported higher intentions of leaving their organizations as a result. This finding suggests that teleworking could have undesirable effects in work groups if not managed appropriately.

7.4 Compressed Work Week

Of late, there has been increased interest in the costs and benefits of compressed work weeks as they appear to be useful when times are good for extending shift coverage and for savings in operating costs when fuel prices or other expenses rise. There is contradictory evidence and thought about employees' efficacy when working long (10-12 hour days) and whether, in fact, it is healthy or family-friendly, even though it may result in three day weekends. Compressed work weeks are a fact of life in some occupations, as it is common among nurses, but there is less research on its effects for employees and for organizations than one might wish

7.4.1 Absenteeism, productivity and performance

Baltes et al.'s (1999)²⁵⁸ meta-analysis indicated that compressed work week schedules had no effect on absenteeism or on objective indicators of productivity; however, supervisor's subjective ratings of employee performance were higher for employees on compressed work week schedules.²⁵⁹ Moreover, other studies suggest that there may be a temporal factor: in one study although performance increased in the first year after a compressed work week schedule was introduced, the effect disappeared after two years had passed.²⁶⁰

7.5 Part-Time Work and Reduced Work Load

7.5.1 Absenteeism, productivity and performance

Part-time work is sometimes associated with decreased absenteeism, but absenteeism differences between part-time and full-time employees may actually be due to differences in the type of work performed by full and part-time workers.²⁶¹

The results of studies examining the productivity and performance of part-time employees have been extremely mixed. Whereas some have indicated slight increases in productivity, others have found null or mixed effects.²⁶²

Lee et al. (2002)²⁶³ carried out in-depth interviews with 86 managers and professionals working a reduced work load in firms in Canada and the US. The participants reported either neutral or positive effects on their productivity because they felt more creative and focused and less exhausted. Their supervisors also reported that reduced workload

employees had either maintained or enhanced their performance. Moreover, the co-workers of these employees felt that they had not been adversely affected.

7.5.2 Recruitment and Retention

In the Lee et al. (2002)²⁶⁴ study introduced above, the supervisors of reduced load managerial and professional employees believed that offering this option had enhanced recruitment and retention, particularly in regard to preventing the departure of mothers after childbirth.

7.6 On-Site Child Care/Dependent Care Supports

7.6.1 Absenteeism

In general, parents are vulnerable to experiencing higher rates of tardiness, absenteeism, and partial absenteeism due to child care difficulties when their children are young (e.g., an ill child, child care breakdowns or rigid daycare schedules).²⁶⁵ Part of the appeal of on-site child care and emergency back-up care services is related to perceptions that parental absenteeism is lower.²⁶⁶ More importantly, child care programs have been linked to actual reductions in absenteeism in many studies.²⁶⁷

7.6.2 Recruitment and retention

Several studies in North America and abroad have shown that on-site child care has positive impacts on recruitment and retention.²⁶⁸ Moreover, employees with access to on-site child care centres are more likely to recommend their employers to others, resulting in a recruitment advantage.²⁶⁹

On-site child care has also been linked to reduced turnover in several studies.²⁷⁰ Providing flexible sick leave and child care referral services are both associated with significant decreases in turnover.²⁷¹

7.6.3 Productivity and performance

The findings from the literature in this area have been extremely mixed, although Burge and Stewart (1988)²⁷² found that provision of on-site child care had a positive impact on beliefs about productivity. Kossek and Nichol (1992)²⁷³ found that use of on-site child care was not related to managers' assessments of users' productivity. Likewise, Goff et al. (1990)²⁷⁴ stated that child care benefits had no effect on performance. Similarly, although use of on-site child care was related to ability to work overtime,²⁷⁵ it did not result in improved productivity.²⁷⁶ Johnson and Provan (1995)²⁷⁷ found that there was a positive effect of employer-sponsored child care on wages, especially for women; however, Baughman et al. (2003)²⁷⁸ report that child care centres have a negative impact

on earnings for women who may accept a lower wage in order to have access to employer-sponsored child care.

7.7 Leaves of Absence

The presence of liberal leave policies including those listed below have been linked to reduced turnover.

7.7.1 Maternity leave

- Extension of the length of maternity leave and the ability to avoid mandatory overtime significantly reduced mothers' attrition in the first year following childbirth in the US in the early 1990s.²⁷⁹
- Mothers in the US, Japan and Britain who have access to job-protected maternity leaves have higher wages than those who do not.²⁸⁰
- In Australia, which does not yet offer paid maternity leave, providing a 6-week maternity leave scheme resulted in one financial institution recording a drop in the resignation rate of women on maternity leave from 41% to 18%.²⁸¹

7.7.2 Parental leave

- Men who were depicted as taking a leave of absence from work for parental reasons were less likely to be recommended for promotions than were men who had not taken a leave of absence.²⁸²
- Availability of parental leave had a perceived positive impact on organizational business performance outcomes.²⁸³

7.7.3 Family/personal leave

Johnson (1995)²⁸⁴ notes that problems with dependent care arrangements often can affect productivity and job effectiveness for both men and women.

7.8 Summary

Work-life balance practices can affect organizational performance in several ways. First, they can reduce costs as a result of reduced absenteeism, but especially as a result of reduced turnover rates. Lower turnover rates not only result in lower recruitment and replacement costs, they also signify greater organizational commitment, less loss of institutional or firm-specific knowledge and hence more ROI for the employer. Second, low turnover/high retention can enhance an organization's image in the job marketplace, as well as expanding the talent pool from which applicants can be drawn. This latter outcome is clearly important in a tight labour market. It may also increase shareholder value. Third, low turnover can enhance productivity as a result of reduced stress, less WLC and employees having more control over their workload and work schedule.

Fourth, work-life balance practices can result in healthier employees and reduced accidents and injuries, with consequent reductions in health care related costs. While these findings are important, the actual mechanisms that explain the links between work-life balance practices and organizational outcomes require more clarification. Moreover, the outcomes may differ depending on gender, job type and whether employees have dependent care responsibilities.

8. Organizational Return on Investment

Although work-life balance practices have been increasingly incorporated into organizational work arrangements, there have been few systematic attempts to evaluate their effectiveness and potential ROI.²⁸⁵ Indeed, the scarcity of such studies/analyses is reflected in the corpus of literature reviewed in this section compared to that in the other sections of this report. The implications of this finding is that without a clear understanding of their effectiveness, the business case for work-life balance practices is difficult to make and, as a result, they are likely to receive only limited funding and support from senior management.²⁸⁶

The relative paucity of literature calculating the effectiveness and ROI of work-life balance practices can be partially explained by the complexity that it is likely to involve. Our review has determined that the 'easiest' and perhaps clearest examples of ROI calculations can be done when employers assess the costs and benefits of a specific, visible practice that has clear objectives, and consider its effects independently of other factors or processes operating in the workplace. This approach coincides with what Lobel and Faught refer to as the human cost approach, when one focuses on assessing reduced labour costs or cost savings associated with specific measures that can be monetized (e.g., direct and indirect costs of reduced absenteeism associated with use of an emergency back-up child care program).

More challenging and more difficult are efforts to assess changes in a set of workplace practices, including change in organizational culture that adopts a longer-term investment approach. In such circumstances, the longer-term payoffs of employee engagement and commitment may not be visible immediately and may be more subtle (e.g., the benefits of averted turnover of talented employees and the value of the contributions they make as they advance in firm-specific expertise and leadership). Other challenges include assessing productivity and performance, and the difficulty of relating individuals' performance to financial outcomes. Often certain outcomes of work-life balance practices (e.g., reduced job stress, increased job satisfaction and organizational commitment) are focused on because they are more easily assessed, particularly via organizational surveys. However, it may be difficult to assign a monetary value to such outcomes and hence to measure their effectiveness for calculating ROI. Because they do impact on longer-term outcomes such as physical and mental health symptoms, productivity and performance and turnover intentions they should be included in all calculations of ROI. Outcomes such as absenteeism and turnover rates are the easiest to assign a monetary value to and can, therefore, be more easily incorporated into calculations of ROI.

Despite these and other challenges, however, organizations do need to assess the value of their efforts and there is clear interest in calculating the ROI of work-life balance practices when possible – indeed this report suggests that it is an organizational

imperative. Calculating ROI in terms of cost figures provides all stakeholders such as employers, senior managers and employees with some indication of the efficiency of such practices and the success (or otherwise) of how they have been arranged/implemented (e.g., on-site daycare centres vs. child care referral services).

Reports in the corporate media have identified seven key questions which should be considered **before** establishing a process for measuring the ROI on work-life balance practices.²⁸⁷

- Who will the information be presented to?
- Which other organizational practices compete with (or affect the outcome of) work-life balance practices?
- Who will provide the data – e.g., in-house or external sources?
- What data sources will be used and how will the data collection process be designed?
- How will the findings be quantified? (and, we would add, how will non-quantified data be incorporated into the findings?)
- How will the overall findings be integrated into organizational policy?
- How will the organizational goals of the respective practices be identified?

8.1 Calculating ROI

To calculate the ROI one must look at the relationship between costs (as expressed in monetary amounts) and 1) direct and indirect benefits (also expressed in terms of dollars), which involves a cost-benefit analysis, 2) direct and indirect outcomes (non-monetary indicators), which involves a cost-effectiveness analysis, or 3) subjective judgments about the value of different alternatives, which involves a cost-utility analysis.

For all three methods, the first step is the calculation of direct and indirect costs. This includes both the costs of establishing the practice (sunk costs) and the costs of operating the practice over time (recurring costs). For a cost-benefit analysis, the next step is to assign a monetary value to the benefits, taking into account that the benefits may be indirect and include reduced costs, spillover benefits and multiplier effects. As benefits may not accrue until long after costs have been expended, all effects which occur at different times should be discounted at appropriate rates to make them commensurable.

There are three different ways to calculate cost-benefit figures. The first is net benefits (costs minus benefits), which answers the question of whether the benefits exceed the costs. The second is the cost-benefit ratio (benefits divided by costs), which is a comparison to the null alternative. The third is marginal ratios, in which the cost-benefit figures are compared to competing alternatives (e.g., putting the money in an investment that earns a 5% return).

8.1.1 Calculating absenteeism, especially unscheduled absenteeism

Researchers have estimated that employees who take days off from work because they are experiencing difficulty balancing work and family life cost Canadian employers 2.7 billion dollars in 1997.²⁸⁸ The factors that go into such a calculation should include both direct and indirect costs. The desire to reduce absenteeism, particularly unscheduled absenteeism, is a key concern in service industries and in manufacturing. Research on call centres, for example, suggests that unexpected absenteeism in this environment can create additional costs as high as 25 percent of an employee's salary, leading one telecommunications company profiled by the Corporate Leadership Council²⁸⁹ to experiment with programs to enable employees to have more choice and flexibility in their work schedule. Other organizations have introduced emergency/back-up child care programs to enable employees to come to work when a child is mildly ill or an existing child care arrangement has broken down.

A general rule of thumb in assessing **direct costs** is to multiply the number of days absent by an employee's salary. Absenteeism rates for a group of employees over a period of time can be calculated before and after introduction of a new work-life balance practice, or comparable employees who do and do not have access to a particular practice can be compared. One specialist in such estimations suggests that the true cost of absenteeism is actually a minimum of two times the actual hourly wage of employees since employers must take into account the employee's actual wage, benefits, supervisor's time and lost opportunities resulting from absenteeism. In cases where an employee is responsible for direct revenue for a company, this may still be an underestimate.²⁹⁰ Still, other costs that could result from absenteeism include the cost of replacement personnel, overtime on the part of other employees, and any reduction in sales or service that can be attributable to an employee's absence. Other non-quantifiable costs include the stress that co-workers may experience if they have to cope with additional tasks.

Lobel and Faught (1996)²⁹¹ provide examples of two different calculations based on the use of 3200 back-up child care spaces in a year. One considered only the net savings based on salary. A calculation that included direct and indirect costs resulted in an estimated net saving that was almost 30 times larger (\$1.2 million compared to \$40,200).

While costing absenteeism seems reasonable, the concept itself may be less meaningful in workplaces where flexible scheduling and work at home options are common and where there is a focus on results/work accomplished, rather than on 'face-time'. As well, specialists in this field note that presenteeism (referring both to employees coming in to work when they are sick and shouldn't, and to employees who are present, but unproductive due to stress, burnout or mental health problems) can be far more costly for businesses.²⁹²

8.1.2 Calculating turnover/replacement

Landauer (1997)²⁹³ has reported that in a survey conducted by IBM in 1992, employees in general rated work-balance practices as sixth out of 16 factors that encouraged retention compared to the highest performers who rated work-life balance practices as second. A similar study at Hoechst Celanese²⁹⁴ suggested that employees who were aware of the practices were 39% more likely to expect to stay with the company than those who were unaware of such policies and were 20% more likely to agree with the statement, “I am willing to go the extra mile to meet business needs” – an indicator of organizational commitment. Replacement costs based on these data could allow companies to project what could induce more employees (and particularly high performers or individuals with particular skills) to remain and what level of turnover they might experience otherwise at what cost.

An employee survey may provide information about whether employees are actively looking for or considering looking for a more flexible job at a different company to better manage work and personal life. If one assumes that one third of those looking or considering leaving actually do so, the potential direct costs would be approximately 150% of the salary of each exempt employee in this category and 75% of the salary of each non-exempt employee. This guideline was originally developed in 1992 but has been validated and is considered fairly standard in the business literature. The more senior and specialized the individual is who leaves, the greater the likelihood that his/her replacement cost will be considerably higher, with suggestions that the cost could be 250-350% of annual salary.

Deares et al. (2008)²⁹⁵ have identified a variety of factors that should be included when assessing turnover costs along with all costs involved in implementing particular work-life balance programs. These factors include:

- Separation costs, including the administrative costs associated with termination and exit interviews and severance packages;
- Replacement costs, including the expense of tasks such as attracting applicants, interviews, testing, moving expenses and pre-employment administrative expenses;
- Training costs;
- Vacancy costs (or savings) – the added costs/savings while the position is vacant.

A report by Hudson Resourcing (2005)²⁹⁶ notes that staff turnover and employee satisfaction can also affect the retention of customers. Bachmann (2000)²⁹⁷ cites the example of a bank that, by providing more FWAs, retained branch employees longer, which was associated with higher rates of customer retention.

8.1.3 Decreased healthcare costs and stress-related illnesses

A study by Northwestern National Life Insurance Company indicated that employees from companies with work-life balance practices were half as likely to experience stress or work burnout (regardless of whether they actually used the programs themselves).²⁹⁸ This suggests that organizations may calculate their ROI by measuring the extent to which work-life balance practices and wellness programs have impacted on organizational healthcare costs including the costs of long-term disability claims, prescription drugs and other health-related expenditures.

8.1.4 Employee time saved

‘Employee time saved’ is described as the most direct and measurable financial benefit of work-life balance programs. However, there is no evidence as to how the respective articles/publications have calculated it. The dearth of specific calculations notwithstanding, a study conducted by Work-Family Directions for 300 clients such as Dupont, Hoechst Celanese and Johnson and Johnson, suggests that the availability of employee support and counseling services saved employees an average of 17 hours per year – which was time they would have used during the workday to resolve personal/family related issues.²⁹⁹

8.2 Calculating ROI in Small and Medium Enterprises

While research on the availability of work-life balance practices in SMEs is limited, information on exactly how SMEs in Canada calculate their ROI on such practices is even more so. Thus, for example, while respondents in the CFIB study conducted in 2003/2004 cited better relationships with employees (77%), higher employee job satisfaction (64%), higher employee retention (61%), fewer work absences (48%), increased productivity (34%) and being more competitive in attracting employees (22%), there is no evidence of exactly how these outcomes were measured and the extent to which they connected to costs of implementation and management (i.e., ROI).³⁰⁰

The paucity of formal calculation processes is a reflection of the managerial roles and responsibilities in SMEs. Pohlmann et al. (2004)³⁰¹ state that in the majority of cases (83.6%), it is the business owner or manager who deals with hiring, work scheduling and HR management more generally. They also reported that work-life balance practices were likely to emerge from employee suggestions. Although this close knowledge supports more individualized approaches to policy application, SMEs may lack the facilities/systems to calculate exact measures of ROI. Nonetheless, it is worth noting here that the more informal approach to work-life balance in SMEs may mean that they are better placed to offer such practices compared to their larger counterparts. Indeed, the more formal practices in larger organizations may mean that they become overly rigid thus inhibiting opportunities for flexibility.³⁰² Adding further to the debate about

informal versus more formal provision of work-life balance practices, Guérin et al. (1997)³⁰³ suggest that personalized, informal and ad hoc arrangements may be more effective than formal, widely accessible policies. Empirical support for this assertion can be found in a study by Léger Marketing in 2002, which reported that of the 1,503 participants polled, those in organizations with less than four employees were more satisfied with their access to flexibility to attend personal responsibilities.³⁰⁴

8.3 Corporate Examples of Reduced Costs and Increased Benefits of Work-Life Balance Practices

8.3.1 Reduced costs

Both absenteeism and high turnover rates in organizations are indicative of low morale and job stress. Thus, reducing absenteeism is an important organizational objective for reducing costs. Organizations like Capital One Financial, a financial services company, reported that work-life balance practices reduced turnover and increased productivity and employee satisfaction.³⁰⁵ Similarly, studies of AT&T's teleworking initiative have indicated that while it cost \$2.1 million to develop,³⁰⁶ it has saved \$500 million since 1991.³⁰⁷ The Canadian Teleworkers Association has also reported that about 25% of IBM's 320,000 employees worldwide telecommute saving the company \$700 million in real estate costs.³⁰⁸ Despite the numbers in these reports, however, the AT&T study noted that some of the organizational effects of work-life balance practices – including real estate and turnover costs – are difficult to quantify.³⁰⁹ Indeed, the notion of intangible effects permeates much of the academic literature on this topic – even while the business literature is less circumspect. Thus, for example, in the study of 301 large organizations in Québec introduced above, Guérin et al. (1997)³¹⁰ suggested that the impact of work-life balance practices on organizational outcomes must be interpreted in a broader perspective than strict, short-term cost-benefit analysis.

8.3.2 Enhanced organizational image and retention of 'desirable' employees

Being perceived as having innovative work-life balance practices allows organizations to enhance (or even manipulate) their organizational reputation in the public domain.³¹¹ This means that they are also well-positioned to attract and retain greater numbers of job applicants from which a larger pool of better qualified employees can be selected.³¹² Thus for example, Arup Laboratories, a Medical and Testing Reference Laboratory with 1,789 employees in Salt Lake City, has reported that offering flexible scheduling has helped them to more than double their employee base from 700 in 1992 to 1,700 employees in 2004, whilst reducing turnover from 22% to 11%.³¹³ It is also notable that a variety of 'best employer' surveys regularly use availability of work-life balance practices as an evaluation criterion,³¹⁴ thus indicating the connection between corporate image and the availability of such practices.

8.3.3 Increased productivity and performance

While measuring productivity presents a number of challenges, the existent literature suggests that work-life balance practices generally have a positive impact on individual and organizational productivity. In addition to the previous reference to Capital One Finance, Pfizer Canada reported a 30% productivity increase in its translation department when employees were provided with opportunities to telecommute.³¹⁵

Focusing specifically on customer service as an indication of organizational performance, KPMG has reported that allowing employees to take emergency time off to attend to care responsibilities has been a driving force behind their retention and ‘superlative services’ provision.³¹⁶ Civil Search International, a 19-employee executive recruiter in Arizona, has measured the benefits of its work-life balance policies by pointing to their high employee retention and 50% yearly growth.³¹⁷

Yet another study based on a national sample of 527 US firms examined the extent to which firms provided comprehensive bundles of work-life balance practices, including family/parental leave, child and elder care support, on-site child care and flexible scheduling. Organizations that offered more extensive bundles of work-life balance practices had higher ratings on a measure of organizational performance obtained from senior HR directors on such dimensions as being able to attract essential employees, the quality of relations between management and employees, and product quality.

In addition, firms that offered more comprehensive policies and supports demonstrated higher profit and sales growth. These findings were stronger for older firms and firms employing larger proportions of women.³¹⁸ Similarly, in a study of 195 large US firms, those that offered a greater number of work-life balance practices to their employees had a higher productivity impact (measured by an assessment of sales per employee), especially in firms that rely on a relatively large percentage of women and professionals in their organization.³¹⁹ The only work-life balance practice that has demonstrated a negative impact on productivity and profitability is job sharing, probably because of the additional costs and management challenges this practice sometimes incurs.³²⁰

8.4 Summary

While calculating ROI for work-life balance practices can be understood as an ‘organizational imperative’ it is clear that relatively few organizations are engaging in such practices. Moreover, studies and reports of organizations that are actively calculating their ROI provide only limited information about how those calculations are made. A study of 20 Swiss employers from the Basel region,³²¹ for example, indicated that annual savings expected from the provision of a specific family-friendly package was anticipated to exceed the package implementation costs by about 8%, which corresponded to the projected ROI. However, the respective paper did not provide the

economic model used to make those calculations. This can be partly explained by the complexity of identifying and calculating the impact of work-life balance practices on absenteeism, turnover/replacement, healthcare costs and stress-related illness and employee time saved, as described above. It is further complicated by the challenge of calculating their impact on more intangible outcomes such as employee satisfaction, heightened organizational image, etc.

BOX 3**Fostering Flexibility: Work and Family
CFIB Survey on Workplace Practices³²²
Survey of 10,699 SME owners in Canada between 2003 and 2004**

Key Questions:	<p>Do SME owners achieve work-life balance?</p> <p>How do SME owners develop and offer FWAs to their employees?</p> <p>What are the perceived benefits of FWAs in SMEs?</p>
Findings:	
Number of hours worked by owners:	<p>More than 60 hours a week (25%), 50-59 hours a week (31%), 41-49 hours a week (27%), fewer than 40 hours a week (17%). 16% of business owners have not taken a one-week vacation in the last three years. 18% have taken a one-week vacation only once. The bigger the business the greater the likelihood of owners having taken a one-week vacation in the last three years, depending on sector.</p> <p>Only one third has an opportunity to relax during their time off work but 40% can balance professional and personal commitments. Owners of businesses with more than 100 employees are better able to balance their personal and professional needs..</p>
FWAs in SMEs:	<p>94.5% of employers feel they have primary responsibility for fostering FWAs and 94% provide some form of FWA, e.g., flexibility in scheduling a vacation (79%), time off for personal issues (74%), flexible work schedules (57%), flexibility for child care (46%), time off/compensation for extra hours (43%), bankable hours for time off (41%), voluntary reduced work time and salary (21%), compressed work week (15%), ability to work from home (12%).</p>
Reasons cited for offering FWAs:	<p>More than 90% of owners say FWAs are beneficial, regardless of size, age or industry sector, e.g., better relationships with employees (77%), higher employee job satisfaction (64%), higher employee retention (61%), fewer work absences (48%), increased productivity 34%, more competitive in attracting employees 22%. Larger and older firms are more likely to benefit from adopting FWAs.</p>
Difficulties in offering FWAs:	<p>6% do not offer FWAs primarily (73%) due to lack of synergy with business practices. 17% believe they are too expensive/difficult to apply.</p>
Ways to develop FWAs:	<p>Through experience (88%), employees' suggestions (34%), formal consultations with employees (16%), following industry standards (9%), using government guidelines 3%.</p>
Helping SMEs to provide FWAs:	<p>Lower payroll taxes (39%), fewer regulations (36%), more skilled and qualified labour (34%), assistance in managing short term staffing needs (14%); help in finding resources/further information (7%).</p>

9. Lessons Learned About the ROI of Work-Life Balance Practices

Assessing the ROI of work-life balance practices is important and highly recommended, but hardly easy – not the least because they operate within organizations that have a range of other HR practices and in organizational cultures that may facilitate or impede desired benefits. Appreciating and quantifying the effects of any specific work-life balance practice separately from other factors can be challenging. In addition, while quantification and evaluation of the outcomes of such practices moves some way towards calculating ROI, it cannot tell the whole story. There may be other, more intangible and unquantifiable outcomes that contribute to organizational and individual performance that should also be taken into consideration. Consequently, because the ‘intangibles’ may contribute to ROI as much as their more tangible and quantifiable counterparts a more holistic, comprehensive, composite and dynamic understanding of such practices is essential.

This review suggests that there is widespread evidence in the academic and business literature of the extent to which organizations can use work-life balance practices as a means of leveraging the talents and skills of their employees. In addition to meeting organizational objectives, such practices also allow employees to fulfill their responsibilities as effective parents, responsive caregivers, life-long learners, and engaged citizens. In this regard work-life balance practices support both organizational and individual goals. Adopting this perspective, however, requires a ‘paradigm shift’ which moves away from more traditional conceptions of work-family balance practices as being necessary accommodations for a specific subset of employees (notably women with young children) to a broader view that acknowledges the importance of work-life balance for all employees and its connection to organizational and individual performance. Indeed, reports in the academic and business literature have suggested that enabling employees to achieve work-life balance is a ‘core competency’ for many contemporary organizations in Canada and beyond.

While we have emphasized the centrality of calculating ROI as an organizational imperative, the value of this broader, more nuanced perspective is that it goes beyond reconciling visible costs and cost savings to appreciating the longer term impacts of increased employee engagement, productivity and resilience, as evidenced in employees’ commitment, retention, and career advancement within the organization. In addition, developing and implementing effective work-life balance practices along with other effective HR practices can result in transformative organizational changes that allow workplaces to more easily adapt to economic, demographic and environmental circumstances.

Our argument for a broader conception of work-life balance practices notwithstanding, this review also emphasizes that development, implementation and evaluation of such

practices must be appropriately contextualized. In other words, managers and corporate executives responsible for the implementation and evaluation of work-life balance practices must be sensitive to their respective organizational and industry circumstances. We have also shown the need for sensitivity to the differential impacts and outcomes of different practices such as increased flexibility, flexplace arrangements, a compressed work week, leave periods and child care and elder care supports on individual performance, organizational commitment and turnover intentions, amongst others.

Given our target audience, we have focused primarily on the Canadian and US literature. Similarly, much of the information provided here focuses on larger organizational contexts. However, our review of the literature on Canadian SMEs indicates that they too have much to gain from adopting work-life balance practices. Indeed, given their contribution to the Canadian economy, there is a strong case for further research to expand what we know about the use of such practices in SMEs. Moreover, recent analyses of national data in the US indicate that such practices can be highly advantageous for low-income employees working undesirable shifts and with limited access to traditional employer-provided benefits.

Our review of the use of work-life balance practices outside of North America suggests that managers and corporate executives (and particularly HR professionals) in other countries share the same experiences and challenges as their Canadian counterparts. Thus, for example, in response to government legislation, an increasing number of managers in the UK are embracing the use of work-life balance practices as an integral part of their organizational development and strategy. Indeed, they are being seen as a key source of competitive advantage in the recruitment marketplace. This being the case, we conclude that if Canadian HR professionals, who appreciate the importance of attracting, retaining, and engaging employees in a shrinking and diverse labour force, are to compete with their colleagues in other countries, they must develop a robust understanding of work-life balance practices as both an organizational and national imperative.

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* Indicates articles the authors deem to be seminal.

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Appendices

Appendix A: Annotated Bibliography

Articles the authors deem to be seminal are offset in text boxes

Non-Academic References

CCH Incorporated (2005). 2005 *Unscheduled absence survey: Costly problem of unscheduled absenteeism continues to perplex employers*. Riverwoods, IL: Author.

This document reports data from the 2005 CCH Unscheduled Absence Survey. This survey was completed by 323 HR executives from US organizations of all sizes and from a variety of sectors. Results indicated that although the rate of unscheduled absenteeism did not increase from 2004 to 2005, the average per employee cost had risen from \$610 to \$660 per employee. This calculation used direct payroll costs from paid, unproductive time, but predicts the costs should be higher if lost productivity, morale and temporary labour costs were considered. The document also provides information on usage rates and effectiveness ratings for a variety of work-life balance programs. They found that companies offer an average of nine work-life balance programs (which has increased from eight programs in 2004 and 7 in 2003). The most common programs offered by organizations were: Employee Assistance Programs, Leave for School Functions, Wellness Programs, Flu Shot Programs, and Fitness Facility.

Keywords: **United States**, absenteeism, organizational costs, family-friendly benefits.

Chapnik Myers, R. (2008, March 7). The ups and downs of working from home. *Globe and Mail*.

This article provides a review of the pros and cons of teleworking and determines that its suitability is not universal across all organizations. It also cites reasons for the decline in teleworkers between the years 2000 to 2005. Some include a lack of face-to-face interactions that could lead to career derailment and more attractive perks at modern offices. In addition to issues with team cohesiveness, security was also a problem, as millions of records were stolen from a teleworker's home. Some benefits were savings on real estate cost, higher productivity and by giving up a commute it helps clean up the environment. The bottom line in this article was that the upside is that the average teleworker increases productivity by 20-30 percent and the biggest downside is that the boundaries between home and office are often blurred.

Keywords: **Canada**, teleworking, career success, career identity, separation costs, cost savings, return on investment (ROI), productivity.

Corporate Leadership Council. (2005). *Designing and communicating work-life benefits in Canada, Australia and the United Kingdom*. Retrieved November 3, 2008, from www.corporateleadershipcouncil.com

This article reports on a study that examined five companies' approaches to offering work-life balance programs. Companies were located in Australia, Canada and the UK. The research examines three components of work-life balance programs at the companies; work-life balance offerings and design (design and components of the programs), program communication and strategies (communication tools, encouraging employee use, and ensuring manager buy-in), and program evaluation. The evaluation of work-life balance programs includes the measurement of the ROI. The research demonstrates that, when measured by the companies, the program benefits outweigh the costs. Companies included in the research measured ROI in the following ways: sick leave, number of employees returning from maternity leave, employee satisfaction with child care referral services, number of workplace injuries, and overall employee satisfaction. Despite reporting difficulties calculating actual ROI, the companies reported that work-life balance benefits have a positive impact on employees.

Keywords: **Canada**, Australia, United Kingdom, work-life programs, return on investment (ROI), employee satisfaction.

Corporate Voices for Working Families. (2005). *Business impacts of flexibility: An imperative for expansion*. Washington, DC.

Corporate Voices for Working Families surveyed its 46 partner organizations to determine what kinds of flexibility data the organizations are collecting and how these data are being connected to their business objectives. In total, 15 organizations participated in in-depth interviews. Results indicated that flexibility has a positive impact on talent management, especially retention (saving companies millions of dollars in prevented turnover). Further, employees with flexibility have greater job satisfaction, organizational commitment, higher levels of engagement and lower levels of stress. The authors state that these human capital outcomes translated into innovation, quality, customer retention, and shareholder value. Finally, organizations reported that flexibility was a driver of both financial performance and productivity, and was correlated with increased revenue generation. These results were observed with both hourly, non-exempt employees as well as those employees who are salaried and exempt.

Keywords: **United States**, best practices, business case, qualitative data, flexibility, retention, turnover, job satisfaction, organizational commitment, stress.

CROP Recherche Marketing pour le Conseil du patronat du Québec et La Régie des rentes du Québec. (2001). *Conciliation travail-famille, équité salariale, vieillissement de la main-d'œuvre et régime de retraite.*

http://www.cpq.qc.ca/UserFiles/File/Sondages/01novplusieurs_sujets.pdf

This paper presents summary findings of an opinion poll conducted by CROP Marketing Research for the Conseil du patronat du Québec and the Régie des rentes du Québec on work-life balance, pay equity, aging workforce and pension plans. Interviews were conducted with 140 individuals in charge of HR. The Conseil du patronat du Québec (CPQ) is the spokesperson for employers in Quebec. It is actively involved in promoting the interests of business in the province and represents employer associations and companies employing about 70 percent of the Quebec labour force. The Régie des rentes du Québec is the government department administering the Quebec Pension Plan, equivalent to the Canada Pension Plan. (French language article.)

Keywords: **Canada – Québec**, work-life programs, work-life balance, absenteeism.

Deares, J.R., Harris Mulvaney, R.R., Sher, M.L., Anderson, L.E., & Harvey, J.L. (2008). A framework for conducting work-life return on investment. *WorldatWork Journal*, Third Quarter, 21-30.

This article presents a quantifiable approach towards the measurement of ROI for work-life balance programs. The approach is research-based and includes key outcomes of interest to business owners and management. The approach demonstrates the following relationships: the impact of benefits offered on family-supportive organizational perceptions (FSOP) and work-life conflict, the impact of FSOP and work-life conflict on job satisfaction and organizational commitment, and the impact of job satisfaction and organizational commitment on turnover and job performance. The authors present a detailed methodology for calculating ROI using three primary steps: the administration of an employee questionnaire, the gathering of organizational data, and the calculation of ROI based on the organizational data and questionnaire results.

Keywords: Work-life programs, return on investment (ROI), organizational commitment, job satisfaction, employee turnover, job performance.

Hudson Resourcing. (2005). *The case for work/life balance: Closing the gap between policy and practice.* (20-20 Series). Retrieved October 27, 2008, from http://au.hudson.com/documents/emp_au_Hudson_Work-Life_A4_Std.pdf

This report provides a discussion of the concept of work-life balance and presents research-based, empirical benefits for employers and employees. An outline of cultural considerations for the implementation of flexible work arrangements is given in addition to practical strategies for the development of work-life balance strategies. The report provides a clear discussion of the gap between policy and practice, dimensions of organizational culture that account for the gap, and recommendations to employers to

work towards making work-life balance a strategic goal and reality within their organizations. Recommendations include discussion of employer and employee benefits related to work-life balance.

Keywords: **Australia, New Zealand**, work-life balance, organizational culture.

Landauer, J. (1997). Bottom-line benefits of work/life programs. *HR Focus*, 74, 3-4.

This article reviews the studies performed by Work-Family Directions, a consulting firm, on companies such as, DuPont, Johnson and Johnson, IBM, Fel-Pro and Hoechst Celanese which shows that companies do support the work/life needs as employees as they are rewarded with a significant ROI. The results also showed that employees would work harder for their employers and the importance of work/life balance to retain good employees. The results for the ROI are quantified by five key areas that are reviewed in detail with supporting evidence from research conducted on firms. These are employee time saved, increased motivation and productivity, employee retention, decreased healthcare costs and stress related illness and absenteeism. In addition to these quantitative factors, the qualitative factors which are difficult to measure are also discussed. These benefits include heightened corporate reputation, improved community and public relations, enhanced recruitment, and increased employee loyalty.

Keywords: **United States**, case studies, work-life programs, return on investment (ROI), employee retention, absenteeism, productivity, organizational effectiveness.

Lobel, S.A. & Faught, L. (1996). Four methods of proving the value of work/life interventions. *Compensation & Benefits Review*, 28(6), 50-58.

This article reviews obstacles faced by HR managers to proving that work-life balance issues are important to address. Four obstacles are discussed including the identification of specific interventions, putting a price tag on the interventions, benefits of the interventions, and measuring the effect of the interventions. Methods by which HR managers can demonstrate the value of adding work-life balance supports to their organizations are described. Four directions to demonstrate 'value-added' are described and include the human-cost approach (i.e., reduced labour costs associated with specific interventions), the human-investment approach (i.e., long-term pay-offs associated with meeting employee work-life balance needs), the stakeholder approach (i.e., organizational stakeholder benefits), and the strategy approach (i.e., demonstrating how work-life balance supports reinforce business strategies). Ways to evaluate work-life balance initiatives in each approach are also presented along with a discussion of which method to select.

Keywords: Work-life supports, evaluation of work-life programs.

Lockwood, N.R. (2003). Work/life balance: Challenges and solutions. *SHRM Research Quarterly*. Retrieved October 31, 2008, from http://www.shrm.org/research/quarterly/0302worklife_essay.asp#f15

This report defines work-life balance in detail and also identifies the three major factors that contribute to the importance of it. First is global competition, then a renewed interest in personal and family lives and finally an aging workforce. In addition, the results of a study done by Friedman and Greenhaus (2000) in their book titled *Work and Family – Allies or Enemies* are also discussed. To handle the balance they emphasize that working adults learn to build networks of support and if not addressed conflicts of family life can have serious consequences that affect men and women differently. The study also reveals that the combined affect of both employer and spouse/partner support leads to a greater reduction in conflict than only having the support of either the employer or spouse/partner. The final part of this report looks at the employers' perspective and measuring their ROI. While they have realized the importance of employee well being, they also have to determine its affects on business financials. The first step is deciding whether the organization culturally ready for such a change and then being able to effectively communicate it to employees. The final step for employers is to view its affects on their company financials. This report discussed each of the following key factors in measuring ROI: employee time saved, employee retention, increased motivation and productivity, absenteeism, decreased health care costs and stress related illnesses.

Keywords: work-life balance, case studies, return on investment (ROI), organizational effectiveness, employee retention, productivity, absenteeism, healthcare, stress.

Academic References

Apgar, M.I. (1998). The alternative workplace: Changing where and how people work. *Harvard Business Review*, 76(3), 121-136.

This report discusses the benefits of telecommuting by drawing on three American companies: IBM, American Express and AT&T. Since about 30 to 40 million people in the United States are now either telecommuters or home-based workers, millions of dollars in cost reduction and increased employee productivity is the top motivator for organizations to transform their workplace to grab these benefits. In addition, these alternative workplace programs are beginning to offer opportunities to capture government incentives and avoid costly sanctions. However, there are suitability factors to consider as well as the process of adopting and implementing these changes. Some of the challenges discussed in this report include the cultural changes in environment and the difficulty in developing criteria to determine suitability. This report also specifies some guidelines for firms on the gradual process of implementing alternative workplaces.

Keywords: **United States**, telecommuting, cost reduction, productivity.

Arthur, M.M. & Cook, A. (2004). Taking stock of work-family initiatives: how announcements of family-friendly human resource decisions affect shareholder value. *Industrial and Labor Relations Review*, 57(4), 599-613.

This article is a meta-analysis examining the relationship between 231 work-family balance programs and share price reactions at Fortune 500 companies announced in the Wall Street Journal during the 1971 through 1996 time period. Also, some benefits are discussed such as a firm's ability to attract and retain employees to work efficiently and have a positive affect on firm's performance, in terms of productivity and share price. This study specifically examines share price reactions to firm announcements of work-family balance programs and confirmed a positive correlation. The last part of the article looks at whether the firms making the announcement experienced negative reactions on gender related issues.

Keywords: **United States**, meta-analysis, work-family programs, retention, productivity, return on investment (ROI), job performance, gender.

Bachmann, K. (2000). *Work-life balance: Measuring what matters*. Ottawa, ON: The Conference Board of Canada.

This report is a review of the results of a Canadian survey by the Conference Board of Canada of private and public sector employers (n=220) examining what (if any) formal processes organizations use to measure the effectiveness of work-life balance programs. This is one of the few large-scale Canadian surveys on work-life balance initiatives and no more recent work was available. The survey was called Supporting Work-Life Balance: A Survey of Employer Policies and was conducted in 1999. Formal evaluations of various work-life balance programs had only occurred in 30% of employers providing at least one flexible work arrangement, 18% offering special leave policies, 17% offering child care benefits, and 13% offering elder care/other dependent care benefits. The importance of selecting measures of the effectiveness of work-life balance practices, suggestions for measures, and a review of measures used for evaluation by type of program are given. The report also provides a review of the pros and cons of data collection methods, methods used to collect information by type of program, and examples of accounting measures used for evaluation.

Keywords: **Canada**, work-life balance, work-life programs, work-life effectiveness.

Baltes, B.B., Briggs, T.E., Huff, J.W., Wright, J.A., & Neuman, G.A. (1999). Flexible and compressed workweek schedules: A meta-analysis of their effects on work-related criteria. *Journal of Applied Psychology*, 84(4), 496-513.

This article is a meta-analysis of 29 published and 2 unpublished sources (from 1973 to 1990) that evaluated the effects of flexible and compressed work schedules on work-

related outcome criteria including productivity, supervisor-rated performance, self-rated performance, absenteeism, job satisfaction and satisfaction with schedule. Variables considered as moderators of flexible work schedules included employee type, flexibility of the flextime schedules, time since schedule intervention, and methodological rigor of the studies. Overall, the effects of both schedules were found to be positive although, outcome criteria were differentially affected by type of schedule (e.g., absenteeism was not significantly affected by compressed work week schedules). As well, the level of flexibility of the schedules and the time since the scheduling was implemented were both found to moderate the effects.

Keywords: meta-analysis, flexible schedule, compressed work week, flexibility, productivity, absenteeism, job performance, job satisfaction.

Batt, R. & Valcour, P.M. (2003). Human resource practices as predictors of work-family outcomes and employee turnover. *Industrial Relations*, 42(3), 189-220.

This article uses United States data from the 1998 Cornell Couples and Careers Study of dual earner couples (n=557). Using hierarchical regression analysis, the impact of three types of HR practices (work-family balance policies, HR incentives designed to induce attachment to the firm, and work design) on three outcomes of interest (work-family conflict, employees' control over managing work and family demands, and employees' turnover intentions) was examined. All three sets of practices were found to significantly impact the outcomes of interest. Work design characteristics were the strongest predictors of employees' control over managing work and family demands. HR incentives were the strongest predictors of work-family conflict and turnover intentions. In addition, gender differences were explored for each of the models. For both men and women, work design was strongly related to control over managing work and family and job security was strongly related to lower work-family conflict and lower turnover intentions. However, significant differences were found between men and women with regards to the impact of having a supportive supervisor and access to flexible scheduling.

Keywords: **United States**, flexible schedule, turnover intention, dependent care, supervisor support, dual-earner couples.

Baughman, R., DiNardi, D., & Holtz-Eakin, D. (2003). Productivity and wage effects of 'family-friendly' fringe benefits. *International Journal of Manpower*, 24(3), 247-259.

This article examines the wage and productivity effects on an organization when it participates in family-friendly work benefits. As the labour force for women increases dramatically, employers are pressured into addressing some of the work-life balance issues. These include offering flexible sick leave, child care assistance and flexible scheduling policies. The financial tradeoff for flexibility that provides measurable reductions in turnover/absenteeism and productive employees is to pay lower entry level wages than competitors. One of the biggest problems with such initiatives cited by this

article is the lack of quantitative studies of a cost-benefit analysis. The survey conducted in this article addresses whether employers who offer these benefits enjoy quantifiable gains in four areas of productivity: morale, turnover, absenteeism and recruiting effectiveness and also if they are able to recover all or part of the cost by paying lower wages.

Keywords: **United States**, productivity, family-friendly benefits, paid parental leave, sick leave, child care, flexible scheduling, turnover, absenteeism, return on investment (ROI).

Bloom, N., & Van Reenen, J. (2006). Management practices, work-life balance, and productivity: A review of some recent evidence. *Oxford Review of Economic Policy*, 22(4), 457-482.

This article discusses management and work-life balance practices using a combination of quantitative surveys and a qualitative case-study approach with 732 manufacturing firms from the US, France, Germany and the UK. They examined management practices which included elements of shop floor operations, monitoring, targets, and people management. Work-life balance measures included part-time flexibility, time off for family duties, child care support and the ability to work from home. Finally, firm level productivity was calculated using quantitative information on firm sales, employment capital, and materials coming from the company accounts and proxy statements. Results indicated that although the US had the best management practices, they also had the worst work-life balance, which supports a ‘trade-off’ model between competition and work-life balance. However, by examining the within-country variations, the authors find that the tradeoff view is inconsistent with the evidence. Specifically, they find that work-life balance outcomes are significantly related to better management, with well-run firms having both higher productivity and offering better conditions for their employees. Further, although better work-life balance practices are associated with higher levels of productivity, the relationship disappears when controlling for the overall quality of management. That is to say, firms with better management practices will tend to have both higher productivity and better work-life balance.

Keywords: **United States**, France, Germany, United Kingdom, work-family balance, productivity.

Bond, J.T. & Galinsky, E. (2006). *How can employers increase the productivity and retention of entry-level, hourly employees? (Research Brief No. 2)*. New York, NY: Families and Work Institute.

This is the second report in a series examining the low-wage workforce. Specifically, this report examines the ways that employers can increase the productivity and retention of entry-level, hourly employees. It contains findings from the 2002 National Study of the Changing Workforce (NSCW) conducted by Families and Work Institute. The NSCW

contains interview results from representative national samples of the US workforce collected between 2002 and 2003. Results indicated that creating more effective workplaces for all employees – workplaces that empower and support them – has broad positive impacts on entry-level, hourly, low-wage and – income employees that are similar to, and sometimes greater than, the impacts on more advantaged employees. Specifically, the authors state that when workers are given more responsibility, are accordingly held accountable, and are supported at work, they are more effective workers (they are more satisfied with their jobs, more committed to their employers, potentially more productive, and more likely to be retained). These workers also exhibit better mental health, which bodes well for higher productivity and lower health care costs.

Keywords: United States, productivity, retention, low-wage worker, organizational support, job satisfaction, organizational commitment.

Bond, J., Thompson, C., Galinsky, E. & Prttas, D. (2002). *Highlights of the National Study of the Changing Workforce*. New York, NY: Families and Work Institute.

This report summarizes results from a survey conducted by the Families and Work Institute in the US. The survey is the *National Study of the Changing Workforce* and has been conducted every five years (from 1977 to 2002). These results are from the 2002 study. Five topics are examined for this report including women in the workforce, dual earner couples, the role of technology in employees' lives on and off the job, work-life balance supports on the job, and working for oneself versus someone else. The work-life balance supports on the job section was reviewed for this entry. The availability of work-life balance supports on the job are reported to have increased slightly over the last decade but, at the same time, employees with families are found to report significantly higher levels of work-family conflict compared to 25 years ago. Positive work outcomes related to work-life balance supports were found to include increased job satisfaction, commitment to employer, and retention. Positive life outcomes related to work-life balance supports found to include reduced work-family conflict, less negative spillover from work to family, increased life satisfaction, and increased mental health. The report also identifies specific work-life balance policies and practices.

Keywords: United States, work-life supports, work-family conflict, work characteristics, mental well-being, job satisfaction, retention, best practices.

Comfort, D., Johnson, K., & Wallace, D. (2003). *Part-time work and family-friendly practices in Canadian workplaces*. Ottawa, ON: Statistics Canada.

This article uses data from Statistics Canada's 1999 *Workplace and Employee Survey* (WES) examining part-time work and the provision of 'family-friendly' work arrangements. The survey consisted of two parts, a workplace survey and a survey of employees within the workplace. Part-time work is defined as work which allows employees to reduce their number of paid work hours. Flexible work arrangements are

defined as those that allow employees to reorganize their work time or place based on their personal needs (e.g., telework and flextime). Access to flextime schedules was reported by a third of Canadian employees; however, access to other family-friendly work arrangements was very limited. Access to family-friendly work arrangements was found to be consistently linked to several establishment characteristics including industry and company size and unrelated to employees' personal or family characteristics. Women were less likely to participate in flexible work arrangements than men (a finding that was consistent across industry and occupation).

Keywords: **Canada**, family-friendly practices, part-time work, flexible work arrangements, telework, flextime.

Duxbury, L. & Higgins, C. (2003). *Work-life balance in the new millennium: Where are we? Where do we need to go?* Ottawa, ON: Canadian Policy Research Networks.

This report is one in a series that reports results from a 10 year study of work-life conflict in Canada, with a sample of 31,571 employees. This report examines the prevalence of work-life conflict in Canada, how it has changed between 1991 and 2001, and the impacts of work-life conflict on Canadian organizations, families, and employers, while examining the impact of gender, job type, sector of employment and dependent care status. Results indicated that high work-family conflict is associated with increased absenteeism and lowered organizational performance. Specifically, they state that the direct costs related to absenteeism due to high work-family conflict are approximately \$3 to \$5 billion dollars per year. Further, work to family interference is negatively associated with recruitment and retention within organizations, and high levels of work overload led to higher instances of physical and mental health problems. Implications for organizations, employees, and families are discussed along with recommendations to reduce work-family conflict.

Keywords: **Canada**, work-family conflict, dependent care, absenteeism, recruitment, retention, quantity of work, mental well-being, organizational effectiveness, longitudinal data.

Fang, T., & B. Lee. (2008, March 26-29). *Work-friendly benefits and labour market outcomes*. Paper presented at the 2008 Western Academy of Management Meeting, Oakland, CA.

This paper examines the employee outcomes (including turnover intentions, pay levels, job satisfaction and promotion levels) of those who choose to receive family-friendly benefits. The analyses were run on the 1999 and 2003 waves of the *Workplace and Employee Survey* (WES), which consists of a broad range of information on a nationally representative sample of Canadian employers and their employees. The WES examined various family-friendly workplace practices such as flexible work hours, reduced work week, and compressed work week (flexible scheduling policies) and child care support

or/and elder care support (dependent care services). Results indicated that across the different family-friendly benefits, evidence of positive labour market outcomes emerge when a bundle of such programs are used conjointly. Specifically, the authors state that with the right combination of flexible friendly benefits, workers improve employee productivity as measured by wages and number of promotions, as well as employee morale such as job satisfaction and improved employer performance (e.g., higher retention rate). They conclude that providing family-friendly benefits relating to flexible hours seem to result in increased productivity (through increased promotions and retention). On the other hand, providing family-friendly benefits relating to care seem to result in increased job satisfaction and morale.

Keywords: **Canada**, flexible schedule, telecommuting, childcare flexibility, eldercare flexibility, family-friendly benefits, productivity, job satisfaction, longitudinal data.

Ferrer, A. & Gagné, L. (2006). *The use of family-friendly workplace practices in Canada.* (Working Paper Series No. 2006-02). Montreal, QC: Institute for Research on Public Policy.

This report examined the factors influencing the usage levels of work-family balance benefits within organizations in Canada. Specifically, it focused on whether or not there is a mismatch between the availability of benefits and the need of the benefits. The analyses were run on the 1999-2002 *Workplace and Employee Survey* (WES), which consists of a broad range of information on a nationally representative sample of employers and their employees. Results indicated that full-time workers were not using flexible hours to deal with family to work conflict. Female workers however, tended to choose organizations with telework policies in order to alleviate their family demands. Evidence was observed of a mismatch between the provision of family benefits, which seems biased towards workers who are not in as much need of the policies.

Keywords: **Canada**, work-family benefits, flexible schedule, telecommuting, family support, usage rates, longitudinal data.

Galinsky, E., Bond, J.T., & Hill, E.J. (2004). *When work works: A status report on workplace flexibility. Who has it? Who wants it? What difference does it make?* New York, NY: Families and Work Institute.

The purpose of this paper is to provide a status report on workplace flexibility. In particular: flextime, reduced time, flex-leaves, flex-careers and flex-place. It also argues that for such programs to be successful the needs of both the employer and employee must be met. These flexible practices are incorrectly defined as ‘perks’ for employees, when it really is a win-win situation for both parties. It improves business performance and bottom line outcomes such as productivity for employers, while also improving the quality of life for employees and their families. The empirical evidence reviewed here is drawn from the *National Study of the Changing Workforce* (NSCW). Another important

section of this paper examines 13 specific measures for the flexible workplace that can quantify the ROI. Meanwhile, it also recognizes that workplace flexibility is not for all organizations and the key point here is to first determine the suitability of offering such packages to the organization's culture. Throughout this paper, there are a series of questions that are consistently answered for each type of workplace flexibility such as: who has access to such benefits, who are the users and how it impacts both employers and employees from a cost and benefit perspective.

Keywords: **United States**, workplace flexibility, organization performance, productivity, work-life quality, return on investment (ROI), organizational culture.

Hannon, J.M. & Milkovich, G.T. (1996). The effect of human resource reputation signals on share prices: An event study. *Human Resource Management*, 35(3), 405-424.

This event study examined whether HR announcements in the business press have changed the perception of capital market participants and whether it has affected the share prices of companies. An example of such HR reputation announcements is 'Most Admired Corporation in America' or 'Best Company for Women.' This study determines whether HR reputation signals are adding value to the company and if it is a result of HR good practices that is now a source of competitive advantage for many firms. The second half of this study examines whether favorable HR reputation signals positively influence the views of the participants of capital market which in turn also leads to higher share prices. The corporate financial performance examined estimated the changes in company market values that were because of public announcements related to their HR practices. Generally, reputable firms attract more qualified employees because of what they can offer them with good HR policies. In turn, workers are more productive and generate higher profits for their company and also provide a competitive advantage, which all translates into a high ROI as well as a high return on equity (ROE). Furthermore, the implications of most of the capital market theories and tools are also discussed.

Keywords: Return on investment (ROI), best practices, employee retention, organizational performance, return on equity (ROE), productivity, quality of work.

Hayward, B., Fong, B., & Thornton, A. (2007). *The third work-life balance employer survey: Main findings.* (Employment Relations Research Series No.86). London, UK: Department for Business, Enterprise and Regulatory Reform.

This report presents findings from the Third Work-Life Balance (WLB3) Employer Survey in the UK conducted in 2006. (A survey of employees was also conducted and published in a separate report.) The availability and uptake of work-life balance arrangements was found to have increased since the previous survey in 2003 with employees in more than 40% of workplaces using two or more flexible working time arrangements. Employers reported on working hours of employees, awareness of changes to legislation, the availability and uptake of flexible work arrangements (e.g., part-time

work, job sharing, flextime, compressed work week, reduced working hours, working from home), maternity leave and benefits, paternity leave, parental leave and other special leaves, employer supports for working parents, and attitudes towards work-life balance. Employers also reported on the perceived effects of flexible work arrangements including employee relations, motivation and commitment, recruitment, turnover, productivity, and absenteeism. Finally, employers reported about the implementation of flexible work arrangements and leaves. Employers were found to report perceived benefits from work-life balance practices for both employees and workplaces; however, employers recognized that the implementation of flexible work arrangements was not always easy or available to all employees when it could cause business disruptions.

Keywords: **United Kingdom**, work-life balance, flexible work arrangements, maternity leave, paternity leave, parental leave, retention, productivity, absenteeism.

Hegewisch, A. & Gornick, J.C. (2008). *Statutory routes to workplace flexibility in cross-national perspective*. Washington, DC: Institute for Women's Policy Research.

This report compares 20 high-income countries (Australia, Austria, Belgium, Canada, Denmark, Finland, France, Germany, Greece, Ireland, Italy, Luxembourg, Netherlands, New Zealand, Norway, Portugal, Spain, Sweden, Switzerland, and the UK) with the United States. Results indicated that of the 20 countries, 17 have statutes to help parents adjust working hours, 6 assist with family caregiving responsibilities for adults; 12 allow flexible hours to facilitate lifelong learning; 11 support gradual retirement; and 5 countries have statutory arrangements open to all employees, irrespective of the reason for seeking different work arrangements. The report also discusses common employer grounds for refusal and notification periods necessary from employees in order to take advantage of the flexibility. Further, due to the arrangements offered in each country, an examination over the last decade indicates that at least small increases in women's labor force participation have been observed in all countries except the United States and Sweden. However, these policies are generally not treated as stand-alone policy tools, but have almost always coincided with improvements in child care provision and in parental leave and other statutory supports for parents and caregivers. Finally, even in situations where employers were concerned about the costs being prohibitive, an evaluation of statutes supporting flexible working hours shows that the laws have caused few problems for employers.

Keywords: **United States**, Australia, Canada, Netherlands, New Zealand, United Kingdom, family-friendly practices, formal policies.

Higgins, C., Duxbury, L., & Lyons, S. (2007). *Reducing work-life conflict: What works? What doesn't?* Ottawa, ON: Public Health Agency of Canada.

This report is the fifth in a series of six reports focused on the *2001 National Work-Life Conflict Study* in Canada, examining what employers, employees and families can do in

order to reduce work-life conflict. It contains results from a sample of 31,571 employees. This report discusses how organizational interventions (i.e., flexible work arrangements, supportive management, supportive services and policies), individual coping mechanisms (i.e., having fewer children, delaying starting a family, working harder and prioritizing), and family coping strategies (i.e., working different hours than spouse, planning family time, and gendered division of labour) moderate the levels of work-life conflict of employees. At the organizational level, it was found that supportive management and perceived flexibility are associated with an increased ability to cope with work-life conflict. Part of this may stem from the fact that work-life balance programs and policies are necessary, but not sufficient, in that they will not be implemented or used if an employee's manager does not support work-life balance issues.

Keywords: **Canada**, work-life conflict, flexible work arrangements, management support, family-friendly practices, longitudinal data.

Kelly, E.L., Kossek, E.E., Hammer, L.B., Durham, M., Bray, J., Chermack, K., et al. (2008). Getting there from here: Research on the effects of work-family initiatives on work-family conflict and business outcomes. *Academy of Management Annals*, 2(1), 305-349.

This article reviews more than 150 peer-reviewed studies to determine whether work-family balance initiatives reduce work-family conflict or improve work-family enrichment for employees and also whether employees' work outcomes and organizational business outcomes are improved when work-family conflict is reduced. Employees' work outcomes reviewed include work attitudes and behaviours. Work-family conflict was found to be related to job satisfaction, organizational commitment, turnover intentions, tardiness, and absenteeism. Organizational business outcomes include firm productivity and firm financial performance. Actual ROI evidence for work-family balance initiatives was rarely found to be clear; however, employees in organizations reporting higher work-life balance quality were more likely to have higher job satisfaction, growth potential, and job security, which, in turn, were related to firm productivity. Based on the findings, the authors make four recommendations for a future research agenda: the need for more multi-level research, the necessity of using an interdisciplinary approach, the benefits of longitudinal studies with quasi-experimental or experimental designs, and the challenges of effectively translating research into practice.

Keywords: **United States**, work-family initiatives, work-family conflict, work-family enrichment, work outcomes, business outcomes.

Konrad, A.M. & Mangel, R. (2000). The impact of work-life programs on firm productivity. *Strategic Management Journal*, 21(12): 1225-1237.

This article discusses the impacts of work-life balance programs on productivity levels within American organizations with a focus on shifting demographics. Survey data were obtained from 849 senior executives responsible for HR. Further, in order to gain information on productivity, the public, for-profit firms were matched to data from *CD Disclosure* ($N = 195$). The specific work-life balance initiatives included in the study were: on-site daycare, near-site daycare, sick child care, emergency child care, sick days for child care, on-site conveniences, extended maternity leave, gradual return to work, paternity leave, adoption leave, parental leave, spouse placement, supervisory training in work-family sensitivity, flextime, job sharing, part-year work, part-time workforce, voluntary reduced time, and part-time work for professionals. A composite work-life balance index was created by summing the number of programs offered by the organization. The productivity measure for the for-profit firms was a logarithm of sales per employee. Results indicated that firms that employed more professional employees or a higher percentage of women showed a stronger relationship between the provision of extensive work-life balance benefits and productivity.

Keywords: **United States**, work-life programs, work-life benefits, productivity, firm characteristics.

Lee, M.D. and Kossek, E.E. (2004). *Crafting lives that work: A 6 year retrospective on reduced-load work in the careers and lives of professionals and managers*. McGill University and Michigan State University: *Managing Professionals in New Work Forums*. Retrieved November 1, 2008, from <http://flex-work.lir.msu.edu>

This report examines the impact of using formal and informal alternative work arrangements on individuals, their careers, and their families over a six-year period. This study consisted of 81 interviews conducted with a sample of professionals and managers regarding their experiences working on a reduced-load basis. Results indicated that nearly half (47%) of participants continued to choose reduced load work six years later, and on average, those working reduced load over the six years were earning salaries equivalent to those working full-time hours. Many of those who returned to full-time work did so under duress, and would have preferred to remain under a reduced-load arrangement. The authors found that career satisfaction and fulfillment could still be maintained while working reduced-load, even without formal promotions by taking on entrepreneurial ventures, changes in employers or jobs, or increased challenges and the accompanying rewards, although the promotions and rewards were obtained faster in the group that returned to work full-time. Finally, employees maintained a strong career orientation and a high level of commitment to their professional identity, regardless of employment status.

Keywords: **Canada, United States**, reduced load, longitudinal data, job satisfaction, income, promotion, commitment.

Meyer, C., Mukerjee, S. and Sestero, A. (2001). Work-family benefits: Which ones maximize profits? *Journal of Managerial Issues*, 13(1), 28-44.

This article examined the corporate financial impact of family-friendly programs. The data reported in this article come from a survey of ‘the 100 Best Companies for Working Mothers’ conducted by Working Mother magazine. Nine programs (paid leave for a family member’s illness, maternity leave beyond 12 weeks, adoption assistance, onsite child care, permitting work at home, job sharing, flex-time, compressed work week, and part-time work) were examined between 1991 and 1995, resulting in 245 observations for 95 different firms. Further, corporate financial impact was assessed by examining the profit rate (operating income before depreciation as a fraction of sales), profits (operating income before depreciation) and sales (net sales). The authors examined two different models. The first model assessed the absence or presence of the program given that the very presence of a program can increase profits either by enhancing the reputation of the firm and improving the quality of new hires, or by actually increasing worker productivity by reducing stress and/or raising job contentment. The second model the authors used also took into account the extent of usage of each program. Results indicated that not all programs have the same, or even a positive impact, on profits. For example, the sick leave option had a significant and positive impact on profits, while the actual usage of the sick leave option did not impact profits.

Keywords: **United States**, longitudinal data, usage rates, family-friendly practices, organizational profitability.

Pohlmann, C., & Dulipovici, A. (2004). *Fostering flexibility: Work and family. Results of the CFIB survey on workplace practices*. Ottawa, ON: Canadian Federation of Independent Business.

This report presents findings from the 2003/2004 Canadian Federation of Independent (CFIB) *Business Survey on Workplace Practices*. The survey was completed by 10,699 business owners and provides information by province, industry, business size and age. Business owners reported on the approaches they take to balancing their personal and professional lives in addition to the types of flexible approaches offered to their employees, the perceived benefits and ways they developed these practices. The report includes a discussion of what flexibility is and why it is an issue, a portrait of the small business owner, workplace practices and their benefits (flexibility approaches taken by SMEs, reasons for offering flexible workplace practices, difficulties in offering flexibility, ways to develop workplace practices, best approaches, ways to assist SMEs in enabling workplace practices, responsibility in fostering flexibility), and recommendations for employers, employees, and government.

Keywords: **Canada**, small & medium enterprises (SMEs), flexibility, work-life practices.

Shellenback, K. (2004). *Child care and parent productivity: Making the business case.* New York, NY: Cornell University.

This report outlines the methods in which organizations can make the business case for providing employees with quality child care. The report reviews organizational research showing that quality child care can improve productivity, reduce absenteeism, reduce turnover, and increase company value. Further, the report discusses why metrics are not traditionally collected by organizations and explains why this should change. Finally, the report outlines a '5 Step Plan' for HR and work professionals who are beginning to collect work-life balance related data which also provides guidance on possible sources for these data. This section also includes examples and explanations of economic impact formulas for ROI, cost-benefit analysis, breakeven point, payback, and work-life conflict related absenteeism and turnover costs.

Keywords: **United States**, best practices, business case, return on investment (ROI), cost-benefit analysis, absenteeism, turnover.

Todd, S. (2004). *Improving work-life balance – What are other countries doing?* Ottawa, ON: Human Resources and Skills Development Canada, Labour Program.

This report provides an overview of selected work-life balance initiatives developed by countries including the Netherlands, Denmark, Sweden, France, Belgium, Ireland, the UK, Australia, New Zealand, and the United States. The author states that the intention of the report is to provide information on work-life balance issues to a variety of audiences including managers, HR professionals, and employees. The report demonstrates that governments in these industrial countries are increasingly committed to reducing work-life conflict and the social, health, and business costs related to it.

Keywords: **Canada**, Australia, New Zealand, United Kingdom, United States, work-life balance, work-life supports.

Appendix B: List of Acronyms

CARNET	Canadian Aging Research Network
CFIB	Canadian Federation of Independent Business
CFWW	Centre for Families, Work and Well-Being (University of Guelph)
DTI	Department of Trade and Industry (UK)
EAP	Employee Assistance Program
FIW	Family Interference with Work
FWA	Flexible Work Arrangement
HR	Human Resource
OECD	Organisation for Economic Co-operation and Development
ROI	Return on Investment
SME	Small and Medium Enterprises
WES	Workplace and Employee Survey
WFB	Work-Family Balance
WFC	Work-Family Conflict
WLC	Work-Life Conflict
WIF	Work Interference with Family

Endnotes

- ¹ Duxbury, L. & Higgins, C. (2003). *Work-life balance in the new millennium: Where are we? Where do we need to go?* Ottawa, ON: Canadian Policy Research Networks; Korabik, K., Lero, D.S. & Whitehead, D.L. (Eds). (2008). *The Handbook of Work-Family Integration: Research, Theory and Best Practices*. San Diego: Elsevier; Lowe, G. (2005). *Control over time and work-life balance: An empirical analysis*. A report prepared for the Federal Labour Standards Review Committee. Ottawa: Human Resources and Skills Development Canada.
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