

Integrating Care, Work and Community: New Policies for a New Economy

A Report from the Cornell University Conference:

Preparing for the New Century: Innovative Work and Family Strategies¹

By

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Karen Shellenback and Mildred E. Warner²

Introduction and Purpose:

The current economic downturn has substantially impacted the innovation of new work/life policies, programs and practices over the past year. Organizations faced with cutting operational costs have limited the development of new ideas and solutions as many are just trying to survive. Coupled with the fact that even the most innovative work/life concepts, practices and benefit structures are essentially topical applications that do not fundamentally address the vitality, resiliency and sustainability of the underlying and outdated “Organization Man” business model has left the work/life field stagnant in its ability to create real fundamental change. Work/life, as a field, has lost steam because of the inability to help create new, nimble, innovative business models and system change designed to flex and shift with changing business and labor realities.

The current recession aside, dramatic changes in the workforce and worker expectations will continue to push and challenge Whyte’s(1956) traditional “Organization Man” structure of American labor systems. Workforce diversity and full inclusiveness in terms of gender, generations, economic status, and culture will continue and expand. Women, retirees and other non-traditional labor force participation will continue to increase and will continue to force changes upon traditional business structures.

Information gleaned from an extensive literature review of human resources, business management, work/life, academic, and corporate real estate publications, as well as, informal interviews with: 1) human capital leaders in Fortune 500 companies, 2) work/life vendors and service providers, and 3) founders of the work/life field illustrate that in response to economic and structural realities, most traditional work/life practice in 2009 has dissipated or merged into other areas of human resources; career progression, facilities management, information technology, leadership, and social responsibility, or has been absorbed into general business management and human capital practices.

The good news is that “necessity is the mother of invention” and some new ideas have trickled up during these difficult and unstable times, helping organizations focus on what is necessary to remain resilient and flexible in the new century. In June 2009, Cornell University hosted a two day workshop of human resource managers and researchers to explore the challenges and potential for innovation in four areas: 1) child care, 2) financial support for dependent care, 3) work/life policies, such as leave and flexibility and 4) restructuring work. This is a report from that workshop.

In the first section, we outline key themes from the group’s discussion over the two day workshop. In the second section, we outline trends, issues to consider, and potential best practice profiles in the above four areas. These sections are followed with a list of suggested readings for those interested in what the next iteration of work/life and human capital management might be.

² Karen Shellenback is a work/life consultant based in Colorado. Mildred Warner is a Professor of City and Regional Planning at Cornell University. Funding for this project was provided by the Alternative Finance Technical Assistance Consortium, a project sponsored by the W.K. Kellogg Foundation to address the challenges of child care finance.

Section I: Preparing for the New Century: Innovative Work and Family Strategies

Summary of Cornell University Workshop

A two day “think tank” workshop was sponsored by Cornell University to talk about emerging work/life issues and explore innovative work and family strategies that can effect widespread change in public policy and corporate practices. Faculty and administrators from universities and hospitals, as well as business, non-profit leaders and consultants spent two days exploring: 1) the challenges, 2) what the research shows on current practices, and 3) innovative new programs. “Organizations need to look beyond the current economic slowdown,” said Lynette Chappell-Williams, Director of Cornell’s Office of Workforce Diversity, Equity and Life Quality, “to the generations coming in and the older workers already here. For different reasons, they both want the same kind of flexible work environment.” The workshop opened with the challenge of “flexibility for whom?” and concluded with strategies to ensure flexibility and other work/life strategies would benefit workers, management and organizations. Appendix A includes the program. Bios and a list of participants can be found on the website http://economicdevelopmentandchildcare.org/technical_assistance/work_life

Discussion Overview

The first session focused on effective work/life policies. Jennifer Glass, of the University of Iowa, opened the session with a discussion of workplace flexibility. Defined as the ability to alter *hours* (number, and start and end times) and *place* of work, research shows flexibility depends on supervisor discretion. Informal flexibility is more common than formal policies. Despite popular press articles about flexibility, Glass’ research indicates that the workers most in need (women, lower status jobs) report the least access to flexibility, as flexibility is more common in higher status jobs and in jobs held by men. Women’s jobs typically have less flexibility and mothers that use flex policies report lower raises. Furthermore, her research indicates that fathers that use flex policies do not increase their household chores. Glass argues that as a tool for helping balance care and work, flexibility may not be helping women. She believes flexibility does help employers however. It saves employers health insurance costs (for non-covered part-time or contract workers) and lowers paid work costs as home based work, especially when telecommuting, often results in unpaid work.

Glass reported that employers have difficulty evaluating employee performance under flex options. She cited that research has shown cognitive bias against mothers and minorities during performance evaluations. Glass argues that employers need a framework of federal policy to ensure that flexibility is more equitably provided and to address bias in performance evaluation. She recommends policy innovations such as the Right to Ask for Flexible Hours. The UK has such a policy and it has had positive effects in expanding access to workplace flexibility. It has also helped create a more level playing field among employers, by requiring that all employers allow their employees to ask for flexibility. She pointed out that the US Care Giving Act is built on a similar notion of accommodation as found under religious accommodation and under the Americans with Disabilities Act. Glass pointed out that research shows long hours in child care is not good for children and it is expensive, especially for infants. For more information see Glass (2009).

Carolyn Heinrich followed with reports on national survey data of university employees and confirmed Glass’s findings that weaker positioned employees (e.g. students and post doctoral associates) are less likely to ask for flexibility accommodation and when provided, flexibility is more likely to be informal than part of formal policy. She also

Resources for Work/Life Policies in Academic Institutions.

National Clearinghouse on Academic Worklife.
www.academicworklife.org

The Alfred P. Sloan Foundation’s Workplace, Workforce and Working Families Initiative www.sloan.org and the Sloan Work and Family Research Network; <http://wfnetwork.bc.edu/>

University of Michigan’s Center for the Education of Women (CEW) www.cew.umich.edu.

COACHE: The Collaborative on Academic Careers in Higher Education, The initiative to improve faculty recruitment, retention, and work/life quality, Harvard Graduate School of Education www.coache.org

emphasized that informal accommodation is more common than formal policy protection would suggest. For detailed information see University of Michigan (2007). A recent article in *Academe* reports that younger Ph.D. students are thinking twice about entering academia because of universities' lack of attention to work/life integration (Mason et al 2009).

Brad Harrington, Executive Director of Boston College Center for Work and Family, then focused on the implementation gap regarding flexibility. He argued that public policy and human resource policy are less critical to implementation than helping individuals manage themselves and influencing leaders to change corporate culture. He argued that corporate leadership struggles with work/life policies because these policies lack "face validity." Work/life is often equated to "work less" and so it is important to make the business case showing that work/life integration can lead to more commitment, satisfaction, and employees report work is more meaningful (Harrington and Hall, 2007).

The session concluded with a report from Michael Layman of the Society for Human Resource Management. While arguing that better benefits give employers a competitive edge, SHRM was challenging the proposed 2009 Healthy Families Act (which would mandate a minimum of 7 paid sick days per employee/year for employers with 15 or more full-time employees) to create a "Safe Harbor" for employers that already offer the minimum number of paid leave days that can be used for any purpose. SHRM proposes that employers offering this minimum number of days of paid time off would not be required to increase or offer sick days. Layman reported SHRM surveys showing 81% of human resource professionals report providing some form of sick leave in 2009, up from 74% in 2008. There was strong debate among conference attendees about whether sick days and vacation days should be combined, as most large non-union organizations have already moved to combining sick, personal and vacation leave into generic "paid time off banks." Barbara Gault, of the Institute for Women's Policy Research, noted that most employers are small and may not have HR professionals. She also stated that the Institute for Women's Policy Research analysis indicates that the modal number of paid sick days in the US is zero! Mike Petro of the Committee for Economic Development noted that business can take the lead in promoting better work/life policies.

Several tensions and lively debate emerged in the discussion:

- Differences between full time workers (with benefits) and part time workers without benefits. Many low income workers work multiple part time jobs but do not receive benefits from any employer.
- Gender impacts: 1) from occupational segregation – many female dominated jobs are less likely to offer flexibility; 2) from gender divisions in the household - who takes leave in dual earner households and what impact does this have on long term career advancement and income?
- Whether vacation, personal and sick leave should be combined into paid time off banks or kept as separate policy. Many union leaders want to keep them separate. AFSCME leaders pointed out workers traded wages for specific leave time and thus they should be kept separate.
- Flexibility for whom – worker or employer? How do we optimize the benefits and culture to ensure both parties gain?
- Private Action vs Public Policy. Should the focus be on individual leadership vs public policy approaches? Is this a personal responsibility, private business and management training issue, or a public policy issue, or all three? How do we balance concern for public values vs individual diversity and choice? Examples: 1. sick leave policy (a public health issue) vs paid time off policy (used for any purpose), 2. child and maternal health (maternity leave) vs gender neutral (parental leave), 3. family well being (flexibility for worker) vs employer flexibility, and 4. policy equity (level playing field) vs continuation of practices which differentiate employers by level and quality of employee benefits. When we think of children or public health as a social good rather than just a private responsibility, then we may give more priority to public goods values (see England, P. & Folbre, N. (1999) for more discussion). For more information on parental leave models see Lovell and Helmuth (2009).

The next session focused on Restructuring Work. Jennifer Swanberg of the University of Kentucky and Julia Henly of the University of Chicago conduct research with special emphasis on low wage workers. Swanberg, Director of the Institute for Workplace Innovation, pointed out that one in three jobs in the US is low wage. Low wage workers have more complex work-family issues. To better understand the challenges and potentials of flexibility for hourly workers, she described the CitiSales Study of a Fortune 100 retail sales company (see www.iwin.uky.edu for more information). To understand flexibility from a manager's perspective – retention, recruitment and customer service are the top reasons for flexibility. She emphasized the importance of team work, job fit and supervisor effectiveness with special need to train supervisors.

Julia Henly's research focuses on the effects of schedule flexibility on the workplace, family and individual. She emphasized four dimensions: timing, stability, predictability and employee control. She pointed out the challenges of work schedules in low-level jobs and proposed several policy and business interventions (Henly and Lambert 2009). Henly believes that public policy change is needed in several areas: 1) minimum hours legislation – pay for a minimum of three hours, 2) paid sick days, 3) right to request flexibility, 4) right to organize. She also challenged laws which link benefit eligibility to minimum hour requirements such as: Unemployment Insurance, Family Medical Leave Act, Temporary Assistance for Needy Families, Child Care Subsidies and Housing Subsidies. Henly argued that benefit eligibility should be available to those on reduced work hours and should “smooth hours over time”, since low income workers do not have control over their schedules or hours and fluctuating schedules and hours make it difficult for workers to maintain access to these programs. More detail on challenges to low income families can be found in Heinrich and Scholz (2009).

Barbara Gniewek, of Deloitte's Human Capital Advisory Service, noted that lack of flexibility was the primary reason people cite for leaving their jobs. She described change drivers such as shortage of talent, change in women's roles at home, different needs of women in the workplace, different work and lifestyle needs of younger generations X and Y, and new technology which allows people to work from anywhere. There is a misalignment between what the workforce needs and what the workplace offers in terms of career flexibility. She (and Deloitte) argue that current flexibility accommodations are not scalable, are typically negotiated in times of crisis, and don't address tradeoffs. She described the 'mass career customization' approach, used by Deloitte, which allows employees to customize their jobs over time. There is an ebb and flow over career and life and 1) workload, 2) pace, 3) schedule and 4) role in the organization ought to be able to change over time based on employee needs. Deloitte believes that employees should be able to “dial up” or “dial down” individual careers using these four levers. She notes that customization builds loyalty, reduces costs due to lower turnover, and increases productivity because employees are happy (See Section III Trend 2 for more information.)

Cali Yost, President of Work+Life Fit, Inc, reiterated that talent is the top concern right now and “work/life fit” can play a role in retaining talent. Policies (public and organizational) alone do not work; benefits and fundamental culture change must be part of the operating strategy of the organization. For more information on Work+Life Fit see (Yost, 2004).

The discussion that ensued focused on three dimensions of implementation: the role for policy, the role of organizational strategy, and the role of individual leadership. These are a three legged stool – all three are required for success.(see brainstorming and framework notes for day two discussion details) Policy is needed both in the workplace and in public policy to protect lower ranked employees, establish standards, give managers guidelines and prevent self serving tendencies. Power relations, cognitive bias in evaluation, and uneven management commitment require policy to set the values and guidelines and to ensure equity. Managers philosophically may believe in the mission but not pursue it in the individual case. Employees, especially those with less power and resources, need the protection and justification of policy. Policy statements can have strong impact in establishing business attitudes and standards. While policy is necessary, it is not sufficient. Human Resource policies need to be tied to organizational strategy and reward structures, not considered something apart. Care should be given to how to communicate the importance of work/life policies to organizational success. Finally, individual leadership is critical and managers require training. Performance measures need to be fair so that equity is ensured. Finally, manager reward structures need to be tied to individual supervisor management, practice and performance in the areas of flexibility.

Some participants argued that one problem with the new notions of employee empowerment and flexibility – ‘dialing up’ and ‘dialing down’ one's career, customizing work – is that these new approaches can lead to exploitation and may not work in unionized or low wage environments. The assumption behind these career customization structures is that the employee has the power to choose the kind of job she wants. But choices are constrained, especially for low income employees and women. (Deloitte argues that Mass Career Customization is available to everyone at Deloitte from administrative assistants to partners). Some participants proposed that too much flexibility in choice can undermine protections set in place to limit exploitation, and that flexibility is a two-edged sword. It may give workers the flexibility they need to manage work and family, or it may give employers flexibility to exploit workers and undermine protections. Care must be taken to ensure flexibility benefits both employees and employers.

The third session focused on practical interventions around child care support. Two projects were highlighted – one by Cornell, a child care grant funded through the Flexible Spending Account, and the other by a coalition of unions including Local 1199 SEIU, District Council 37, AFSCME and Local 237 Teamsters. The Cornell program,

described in Appendix B, provides up to \$5000/year for child care costs of employees. The program, based on a sliding fee scale, serves employees up to \$150,000 yearly household income. Funds are deposited into the employee's FSA account and available for child care expenses. 882 Cornell employees received child care grants in 2009, totaling \$1.6 million. The average grant award was \$1500. Cornell has conducted two surveys of employees, one in 2007 and another in 2009 which allow the university to track the impact of the grant on participating employees. Karen Shellenback, Lena Hipp and Mildred Warner reported on survey results which show high levels of employee satisfaction with child care, and loyalty to Cornell, as an employer, as a result of the program (see Appendix B and Shellenback, 2009, and Morrissey and Warner 2009 for more information).

The NYC program, outlined by K.C. Wagner, Director of Workplace Issues, Cornell University School of Industrial and Labor Relations, and Moira Dolan, District Council 37, involved worksite enrollment into a child care subsidy program using \$1.475m in funds allocated over two years by the NY City Council for the project. The program was designed for families up to 275% of poverty and has expended \$1.5 million over two years. The average child care subsidy was \$4500. Wagner and Dolan presented preliminary results of a major research project comparing recipients and a control group which did not receive the subsidy. Subsidy recipients reported lower use of sick days, less problems arriving late or leaving early and fewer work warnings or disciplinary actions. However, when the subsidy ended, these benefits to the workplace were reduced. For more information contact K.C. Wagner at kcw8@cornell.edu. Both of these programs are unique in that the employer was willing to conduct a large scale, in depth survey of program effectiveness. Too often, employers do not study the impact of their work life policies and thus cannot track how these programs link to organizational strategy or performance. The Cornell and NYC experiments provide examples for others to follow.

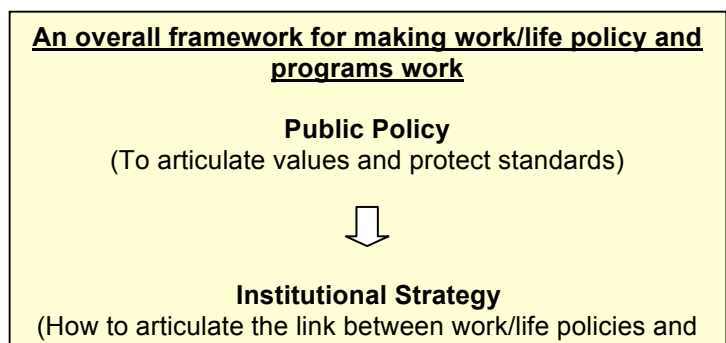
The final session looked toward the future: elder care issues and meeting the needs of a diverse workforce (LGBT employees, minorities, etc). Michelle Artibee, Associate Director of Work-Life Programs at Cornell, pointed out that the child care grant alone is not enough to stimulate a supply response. Cornell had to build a child care center in 2008. The Cornell team made sure the Center would preserve slots for part-time children to better accommodate the needs of employees. Cornell is now exploring the possibility for back-up care options at the Center. In addition, they have hired a Dependent Care Consultant for one-on-one consultation regarding elder care, child care, disability support and tutoring. The Consultant even helps employees find child care when they travel or attend conferences. Much focus is given to information sharing. Email list serves have been created for special populations – lactation, elder care, school closing – and they have developed a family helpers list for child care, elder care companionship, running errands, tutors, even house sitting. Regular workshops and caregiver support networks have been created focused on special needs children and long term care. In 2007, NYS law required reasonable accommodation for lactation. Cornell has created 13 lactation stations around campus and a policy regarding time away from work to pump. This is an example of how public policy can motivate and support employer initiative.

Myra Sabir, of Cornell, then described "life writing" as a means of helping employees tell their story and the positive benefits this has on reducing stress and improving life and work satisfaction. For more information see www.gotmeaninglwp.org. Nancy Bereano of the Tompkins County Group on Working LGBT Aging described the importance of personal networks, beyond family, to "share the care." Such programs would require HR policy to recognize broader definitions of "dependents" or "family" for care networks. In fact, marginalized or disenfranchised groups may show the way for the future as they come up with new models for care that help overcome discrimination. Lynette Chappell-Williams raised concerns about the "sandwich" generation which bears elder and child care needs simultaneously (44% of Americans do both). She also pointed to the need for extended hour child care (from 5:30-6:30pm) to allow compressed workweeks, third shift care, and substitute coverage when the provider is sick. She expressed frustration that union bargaining units are often *not* interested in incorporating work/life benefits in bargaining agreements. As the workforce ages, elderly workers will demand more flexibility – could these requests be translated to others?

Summary and Recommendations

The workshop concluded by brainstorming a framework for thinking about how to make work/life policy and programs work. This framework is not just about "work/life policies," but "work/life strategy" which encompasses culture and policy. Below are summary notes from the discussion

Shellenback and Warner, 2009.



during the meeting and from a subsequent survey of participants about elements in this framework. Special attention is given to meeting the challenges faced in university settings.

Universities are a useful type of employer on which to focus the discussion. They have staff from across the employment and income spectrum – professors to janitors. They are large, place-based institutions which give attention to quality, long term presence and community. Furthermore, they will face critical talent shortages with the upcoming retirement of the baby boomer generation and overall faculty turnover. Universities could be leaders in designing innovative work and life strategies. This conceptual framework does not just operate in a top-down fashion, but can also respond to initiative from the bottom up. Corporate Leadership can impact institutional strategy and employee and union strategies can affect corporate leadership. Both top down and bottom up methods are needed to effectively institutionalize change.

Below are the full notes from the group discussion (brainstorming session) and participant responses to the subsequent survey

Public Policy

Public policy helps articulate broader social goals and creates public dialogue. Public policy helps maintain minimum standards and allocate resources. Public policy can provide resources (not just safety net resources), that facilitate integration of work and non-work spheres to promote economic and social well-being, and create opportunities for innovative funding streams. Maintaining and enforcing minimum standards in essence creates the basic safety net and provides a level playing field.

Policy Recommendations:

- *Right to Ask for Paid Time Off or Flexible Work Arrangements – Model on Americans with Disabilities Act or Religious Accommodation*
- *Remove or reduce minimum hours eligibility for Unemployment Insurance, TANF, Child Care Subsidy, Housing Subsidy*
- *Flexible Spending Accounts: Raise \$5K limit. Allow use even if spouse does not work. Allow use of both FSA and Dependent Care Tax Credit for low and middle income families.*
- *Establish minimum standard for employers for paid time off – Possibly allow “safe harbor” for employers already offering the minimum. Be cautious and mindful of positive and negative impacts regarding combining sick and vacation leave. Where the collective bargaining agreement is better, then do not lower the standard.*
- *Explore possibilities for more work-sharing arrangements that would allow flexibility to work part-time for a broader group of employees.*
- *Employee Free Choice Act*
- *Promote community level strategies: living wage campaigns, community benefit agreements*
- *Support mechanisms for “benefit banks”(voluntary contribution of co-workers to donate sick and vacation hours/days for use by colleagues who need more time off from work)*

Institutional Strategy – Link Human Resource Policy to Core Institutional Mission

Institutional strategy articulates and defines the link between human resource (and work/life policies) and core institutional mission. Human resource strategies, including work/life policy and practice, must be interwoven into the fabric of the institutional mission for resiliency and optimal organizational success. Human resource policies must interconnect with human capital strategy and overall organizational mission and framework.

Policy Recommendations:

- *Align with core mission: for universities, creating research/knowledge and serving students*
 - *Faculty recruitment and retention (also of graduate students and post docs)*
 - *Student recruitment and retention*
 - *Cultural competence, diversity, inclusiveness*
 - *HR policies and work environment create a role model for future professionals*
- *Make the business case: elder care and child care increase employee productivity, reduce absenteeism, lower replacement costs, save on training*
- *Recognize the social value of the support infrastructure: staff, operations so benefits are extended to them as well*

- *Build a broad coalition of stakeholders: alumni, students, and community, as well as administration faculty, staff and union*
- *Use progressive policies as part of a branding and competition strategy*
 - *Create peer pressure among other actors in the sector*
- *Managing institution efficiently will lower costs*
 - *Flexibility policies assist with emergency and disaster planning/response*
 - *Save on real estate costs*
 - *Increase coverage – over time and space*

Overall, use innovative experience as a bully pulpit to influence others. Identify best practice models through professional associations. Use research to make the link to occupational stress and long term savings in health care. Institutional strategy must articulate the empirical link through cost/benefit, ROI, metrics.

Management Buy In and Training

Managers and supervisors are “the organization” to employees. Managers are the front line of policy practice and implementation. They represent and promote the organizational mission, values and ideals to their subordinates. Managers who understand the organizational mission and how work/life values, policy and practice promote the organizational vision and mission are the under-recognized champions of business. Managers need assistance (training and practice support) in understanding why work/life policy and practice are key elements interwoven into the core mission. Supervisors and managers also need access to examples of human capital best practice strategies, as well as networks of other organizational champions. Understanding the principles of everyday practice and getting management “buy in” is crucial for organizational resiliency and success. When management is “on board” and individual managers are vocal champions, their feedback can trickle up to inform institutional policy.

Policy Recommendations:

- *Value of research and making the business case*
 - *Show the link to core mission*
- *Need clear institutional policy*
 - *Articulates the broader institutional view and reason for policy*
 - *Establishes standards, protects lower ranked staff*
 - *Gives managers guidelines, prevents self serving behavior and discrimination*
- *Need individual champions*
 - *Need leadership from the top – the Provost must give direction to the Deans*
 - *Provide training for Deans and Department Chairs*
 - *Find a senior provost or very influential Dean who is interested in becoming a champion for “dial up/dial down” techniques - especially someone who needs to try this strategy for a few months (say to care for their aging father) and does it successfully. With their endorsement, use this person’s popularity among faculty and community to endorse new ways of working. Make it a media blitz - get the word out! Once someone who is well-loved and respected tries this and is successful - resistance melds into acceptance among the community.*
- *Need Managerial training*
 - *Supervisors are nervous about what is legal to ask with respect to family/personal issues*
 - *Help supervisors see the possibility of doing things in a different way*
 - *Change mindsets, let managers see their ability to manage flexibility as an asset in their personal managerial toolkit. This will lead to identity-based motivation*
 - *Pay attention to how adults learn*
 - *Crisis can open minds to new approaches*
- *Address supervisory challenges of remote or flexible work options*
 - *Recognize reality of cognitive bias in employee evaluation*
 - *Provide training in cultural competency*
 - *Consider 360 degree feedback for performance evaluations*
- *Link Department Chair, Dean and Provost job performance evaluations to team management prowess which includes consideration and utilization of work/life programs and flex work practices. Organizations must show the reward to changing behavior. Money is a primary motivator. With exposure, executives and Deans will understand how using work/life practices are immensely useful to them as managers in their own right. Ernst & Young L.L.P. has done*

terrific work in this area, in the early 2000s. Partners were evaluated and HR linked compensation to work/life performance and teamwork engagement among management teams. Although the University environment is different with more lone wolves, information could be gleaned from Ernst & Young success in this area.

- *Involve collective bargaining representatives, or if not available, worksite committees with broad representation of employees to improve education, outreach and buy-in from line workers. Reduce feeling of "us" vs. "them", town/gown, elite/workers.*
- *Connect to senior leadership with stories that will speak to them.* One participant noted, "Often CEOs and executives do not face the same challenges because they have wives/partners at home to take care of things. They only see the inequity when their highly educated, competent and successful daughters are faced with the challenges of raising a family or hit the "glass ceiling". Then the CEO/Provost gets it! Use this to your advantage." These kinds of scenarios and stories can build champions in the University.

Remember, the new economy and new professors will demand change in traditional institutional practices or they will go elsewhere.

Employee Choice/Union Strategies

Workers are the heart of the organization. How do we train employees/workers to understand the core mission and values of an organization and their critical individual roles in helping optimize the work product and environment so that all members prosper? How do we help employees manage and garner more free choice in how, where and when they trade their work/labor for pay? How does an organization empower individual workers to speak up, produce and engage in their work for the betterment of their lives and to create a positive ripple effect on all others in the organization and community? Employees can also be vocal champions; their feedback can trickle up to inform needed management training and institutional policy.

Policy Recommendations:

- *Set policy and make sure employees know about it*
 - *Policy gives employees the right to ask*
 - *Provides real choice if implemented effectively*
- *Try to get unions to include work family issues as formally negotiated benefits*
- *Link to other stakeholder groups (service providers, activists) to share information and best practices*
- *Training*
 - *Provide joint training workshops with managers, unions and employees*
 - *Give release time for training*
 - *Pay attention to how adults learn*
- *Personal Goals*
 - *Help employees define personal goals and standards for personal career and organizational success*

What does "real choice" mean? How much is choice constrained by financial or other factors? It is valuable to partner with unions and with management to institutionalize culture and policies that work within the particular work environment. Monitor implementation of policies to ensure that they are fairly applied. Use successful practices from industry - Verizon, Lucent, AT&T, IBM, Marriott, UPS and others (such as partners on the Corporate Voices for Working Families website (<http://www.cvworkingfamilies.org/>)) have been particularly successful in working with/supporting low wage workers and unionized environments.

Overall Cautions:

- *Flexibility for whom? Not all jobs can flex (in all ways). Lower wage jobs are the least flexible (to workers) and these workers have the least power to negotiate change and face the greatest constraints. However, lower wage jobs are the most flexible from the employer point of view (unpredictability in schedules, etc).*
- *Pay attention to people – change is scary, former coping strategies may no longer work*
- *Hard to "train" higher level leaders (eg Deans, Department Chairs)*
 - *Don't call it training, link to theory, skill building, formalized coaching services*
 - *Need academic leadership for academics*
- *There must be policy protections and consequences for those who fail to comply*

- *Know and understand the "naysayer underground" - to effect change you must influence and understand this group.*

The group then brainstormed a set of innovative ideas and implementation strategies.

Innovative HR Ideas and Implementation Strategies

Broader Approaches

- *Appreciative Inquiry – look at pockets of institution that work well and then scale up*
- *Look for innovative strategies from marginalized groups (eg LGBT, elderly, minorities, women) who have had to come up with alternative coping mechanism. These may provide insights for broader policy and program change.*
- *New technology allows new options.*
- *Students are the university's market. They are looking for progressive workplace policies and may be important allies for change.*
- *Buy-in – look at who is at the table and ask who is missing.*

Specific Ideas

- *Parental Leave – must be accompanied by resources at the Provost level so departmental units do not have to directly bear the cost of implementing the policy*
- *Pay attention to ease of administration - child care benefits are much harder to implement outside the FSA framework*
- *Make sure low income employees receive more through the FSA (eg >\$1500) than they would through the Dependent Care Tax Credit as they cannot use both.*
- *Create part-time tenured faculty lines. We do this for retirees (phased retirement), why not for younger faculty who would like to balance work, family and life?*
- *Recognize networks of care and support through policies which do not limit benefits just to next of kin.*
- *Provide occasional use flex (particular days, events, times of life).*
- *Use parental leave as a model for leaves for elder care and end of life care giving.*
- *Create a free-lancers' union for group benefits.*
- *Give awards – to honor risk takers, profile innovations, and promote more innovation.*
- *Weigh in on legislative issues and partnerships with advocacy groups to find common ground.*
- *Use Deloitte's Mass Career Customization concepts to entice faculty to try new ways of working.*