

# **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 Strategies<sup>1</sup>**

**By**

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

Karen Shellenback and Mildred E. Warner<sup>2</sup>

## 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applications that do not fundamentally address the vitality, resiliency and sustainability of the underlying and outdated “Organization Man” business model has left the work/life field stagnant in its ability to create real fundamental change.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.

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## 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](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](http://www.academicworklife.org)

*The Alfred P. Sloan Foundation’s Workplace, Workforce and Working Families Initiative* [www.sloan.org](http://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](http://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](http://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](http://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](mailto: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](http://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 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.*

## Section II Trends

by  
Karen Shellenback

**TREND 1: Talent and knowledge have replaced capital and raw materials as the primary competitive advantage at all levels of society. Future organizations will harness burgeoning technology to deliver necessary and timely information while managing the benefits and challenges of a more flexible and mobile workforce.**

Technology will continue to change us in fundamental ways as the pace of change today is truly exponential. Moore's Law (Gordon Moore, co-founder of Intel) states that computer chips (processors, memory, etc.) double their complexity every 12-24 months at a near constant unit cost. This means that every 15 years, on average, a large number of technical

capabilities (memory, input, output, processing) grow 1,000 times (Smart, 2006/2007). Barriers to worldwide participation (in terms of access, cost and skills required) for 1.6 billion computer users and 3 billion mobile device users, is rapidly approaching zero (Ross, 2009). New portable solar and other 4G technologies will allow many people to work anyplace and anytime with less potential impacts on the environment.

In essence, workers now own the means of production (Pink, 2001). Many workers are now able to bring their infrastructure with them. The tools necessary to do their job are cheaply available and workers do not necessarily need the employer to provide workspace, machines or technology. Workers are able to work and download immediate information and applications instantaneously. Being "at work" will mean working in the office or other business location, in telecommuting hubs, or in associations globally, and virtually, as employees or as contractors. In essence, power is devolving from the organization and emerging within the individual and their personal networks (Pink, 2001).

**Issues to consider:** Distributed/mobile/flexible workforces can save money and reduce workforce support costs by up to 40% (Ware and Grantham, 2008). Using technology to understand, communicate and utilize the disperse nature of suppliers, business partners, customers, distributors and employees, all available through inexpensive virtual video conferencing and mobile communications technologies, will allow organizations to seamlessly re-combine teams and work process pathways to efficiently structure and execute work. An ROI analysis of a Future of Work client reveals that "moving to a mobile/distributed workforce (People in the office every day, but none full-time. Employees come and go as their work requires them, and they use "touchdown" spaces and conference rooms when at the office) saved the company about \$8,500,000 in salary and support costs (on a \$52,000,000 salary base) and reduced the support cost per worker by over 26%." This does not include the "equally impressive increase in individual and group productivity, increased workforce engagement, and the significant environmental benefits from the dramatic reduction in miles being driven to and from the corporate office facility" (Ware and Grantham, 2008).

Understanding how to harness the positives of virtual networking and "social hiving" technologies and embrace more virtual work practices will become increasingly important for organizations, especially for attracting and retaining younger and older workers (See Trends 5, 6 and 7)(Ross, 2009). In particular, social networking business applications offer new ways to: provide instant customer service and interaction, manage projects and teams, spy on competition, network/recruit for jobs, market and brand organizations, services and products, as well as coordinate worldwide dispersal of information and action.

### Suggested Readings:

Kelley, K., Moore, B., and Holloway, S. (2007). *The future of attraction, motivation and retention: A literature review*. Scottsdale, AZ: WorldatWork.org.  
<http://www.worldatwork.org/waw/adimLink?id=23143>

Pink, D. (2001). *Free agent nation: The future of working for yourself*. New York, NY: Warner Books.

Ware, J. & Grantham, C. (2003). The future of work: Changing patterns of workforce management and their impact on the workplace. *Journal of Facilities Management*, 2(1) May, 142-159.  
Future of Work website: <http://thefutureofwork.net/>

Self paced, individualized e-learning and virtual training technologies will also become a dominant necessity for organizations interested in engaging and retaining a malleable workforce. Training will be provided as instant “apps” (small readily accessible virtual modules available instantly and at anytime in the palm of your hand). How will your organization provide growth and learning opportunities in order to retain premium performance of individual knowledge workers? Future organizations will readily harness the burgeoning technology to deliver necessary and timely information while managing the benefits and challenges of a virtually flexible and mobile workforce. In sum, resilient organizations will embrace technology to “move work to people instead of people to work” (Ware and Grantham, 2008).

**TREND 2: Rapid advances in technology and the emergence of more virtual work and business opportunities is shifting the paradigm from organizational standardization to individually customized experiences.**

**Issues to consider:**

Customization of the marketplace and changing technology in the hands of all people will push organizations toward creating more customized experiences, in order to attract and retain human knowledge and capital. As technology provides increased freedom for many workers to move and shift their careers within organizations by participating in different capacities within different business units; organizations that excel must devise ways to keep workers engaged and continually attracted to their current organization.

Our society will also see a shift that allows more non-traditional workers to move in and out of organizations bringing their knowledge, experiences and expertise to the task at hand, while they garner new experiences which they can harness into new opportunities elsewhere (WorldatWork, 2009).

Organizations will also be faced with career, reward, benefit and virtual learning customization. Instead of traditional pathways, workers will work with employers to create customized career latticing, reward systems and benefits allocations. The most forward thinking organizations are incorporating the non-linear life and work paths of workers, and are moving beyond one size fits all career paths, benefit plans and e-learning support structures traditionally designed for a homogenous workforce.

**Suggested Readings and Video:**

Ruddy, A. (2009). Media Player Video: *The future of attraction, motivation and retention: A literature review*. Scottsdale, AZ: WorldatWork worldatwork.org.  
<http://www.futureoftotalrewards.org/>

Benko, C. and Weisberg, A.C. (2007). *Mass career customization: Aligning the workplace with today's nontraditional workforce*. Boston, MA: Harvard Business School Press.

**Career Customization:** Knowledge workers have been building lattice like careers for twenty years by moving in and out of organizations and up and down hierarchies, albeit without the support of their organizations (Deloitte, 2009). Women especially have “opted out” or “dialed down” their careers as alternatives to the “all or nothing approach” to corporate or academic career ladders. Organizations have made the “mistake of viewing and treating these changes in workforce participation as discreet, solitary events, when in fact, they are connected, converging and creating unprecedented pressure on organizations to accelerate the transition from standardization (ladder) to customization (lattice)” (Deloitte, 2009).

**“With an increasingly diverse workforce, no single reward element will be a value driver.” (Kelley, et al, 2007)**

What Deloitte is calling Mass Career Customization (career flexibility or latticing) is happening at the corporate level (examples include: Deloitte, Bon Secours Richmond Health System, Accenture) as well as academia. Universities such as University of California (UC Davis) and the University of Washington, among many others, have developed their own policies and practices necessary to support faculty while honoring their often competing commitments to both family and career (UC Davis, 2009).

Many universities have provided new or enhanced systemic practices to address the “career latticing concern” by providing online policies and tools including suggested language for requesting: 1) leave, 2) modified duties, 3) tenure clock extensions, 4) post tenure deferrals, 5) transitional support for faculty undergoing life transitions, 6) part-time tenure track appointments, and 7) dual career hiring.

**Customization of Rewards and Benefits:** In an economic downturn, organizations are reducing operational expenses or looking to garner more return on their benefit investments while understanding benefits (including

traditional work/life benefits) and the branding of overall organizational culture are the main arrows in the quiver of employee attraction and retention. Forward thinking organizations will use this economic crisis to hone in on what policies, practices, rewards and benefits create an attractive culture and workplace, and may look to move beyond “one size fits all” plans traditionally designed for a homogenous workforce to examine judicious (and federally compliant) customization of benefit and reward structures for different types of workers. “Technology will enable HR to group reward elements and combine them differently depending on the needs of the employee, the employee group, project or work environment. Instead of offering one thing to everyone, technology will allow customized reward experiences that can attract, retain and motivate the best and the brightest” (Anne Ruddy, President, WorldatWork Video).

Organizations may consider cafeteria style rewards or Section 125 benefit plans or in the future, work with government on emerging (yet compliant, nondiscriminatory) customized and flexible benefit plan designs. Currently, approximately 20% of organizations offer cafeteria or flexible benefit plans. These plans provide benefit flexibility allowing employees to pick from a menu of benefit and work/life options that can be limited only by the employers’ imagination. Flex or cafeteria plans allow employers to upgrade and customize the varied choices of benefits offered while maintaining and monitoring total benefit costs.

Flex plans can be simple (paid insurance premiums with pre-tax dollars) to complex models (credits allowing employee choice of type and benefit level on either a pre-tax or post tax basis). For example: using employer benefit credits (or expending additional employee paid credits) to upgrade coverage for extended paid parental leave, child care assistance, paid sabbaticals, wellness (club discounts), legal assistance and estate planning, special needs services for children, concierge services, pet insurance, car insurance, tuition reimbursement, etc. If the desired benefits surpass current employer contributions, money would be withheld. If it is less, the remainder of “credits” is added to taxable take home pay. From a menu of choices, employees in different life situations and stages can re-direct employer benefit contributions to what each individual (or covered dependents) need each year. From a “One Size Fits All” solution to a “My Size Fits Me” solution (Pink, 2001).

Currently, IRS regulations on cafeteria plans are exact and these plans must be nondiscriminatory and compliant in nature. While such plans can provide significant cost advantages for employer and employee, they can also add to a company’s administrative and recordkeeping burdens. Perhaps the future will see an evolution in government regulated benefit and reward plans based on a diverse, emerging and global labor force that allows for customization at the next level.

Excerpt from Working Mother Magazine:  
“100 Best” Issue, October 2008

***100 Best: What’s Next? Big thinking about what the next generation of work/life benefits will look like (and why you should be excited about what’s coming).***

Better Than Platinum Card: Flex Credit

“It’s the year 2020. To keep all generations of workers happy and to help cap expenses, corporations now offer FamilyFlex to employees. Staffers receive FlexCredits each year based on their position or tenure. These credits can be used toward a menu of benefits: pregnancy support (10 credits), child-tutoring programs (2 credits), extra paid time off (5 credits), sabbaticals (20 credits) and assisted-living benefits (50 credits). Employees can adjust their benefits at any time to fit lifestyle changes, and every plan is customized. The upshot for companies? Reining in benefit costs by limiting spending per employee.”

—Lisa Bodell, CEO, futurethink, a research company that helps employers innovate and prepare for tomorrow in Working Mother Magazine, October 2008



## Best Practice: Work/Life Policies

### *Deloitte Mass Career Customization (MCC): Aligning the Workplace with Today's Non-Traditional Workforce.*

*Mass Career Customization* acknowledges today's career is no longer a straight climb up the corporate ladder but rather an undulating journey of climbs, lateral moves, plateaus, and planned descents, like a sine wave. The premise and model provide a framework for attracting talent and strengthening leadership pipelines while providing more varied and self-paced career journeys. This model eliminates one-dimensional flexibility approaches and makes customized careers the norm.

The *Mass Career Customization* concept is an innovative, transparent, structured approach that identifies four core dimensions of a career: Pace, Workload, Location, and Role. Deloitte employees work with their employer and manager to ensure value and correlate these dimensions to each employee's talents, career aspirations, and evolving personal life circumstances over time, as well as to the enterprise's shifting marketplace strategies and resulting need for talent.

Providing choices that assist Deloitte employees in creating career trajectories that work for individuals in different lifestages, benefits the individual and organization by reducing churn, as well as by increasing productivity, connection and loyalty. It is a model available at all times for every employee.

#### Results:

- Participants report an increase in job satisfaction and productivity, indicating that the MCC framework helps them manage work, career and personal life. MCC also significantly improves the quality of career conversations.
- MCC also builds employee loyalty. Survey findings confirm that respondents who have an effective career-life fit were nearly twice as likely as those who did not to report that they intended to stay for six years or more. Furthermore, 55% of respondents report that upon initial introduction of MCC, the framework positively impacted their continued desire to work at Deloitte.
- Finally, 62% of respondents report that MCC had a positive impact on their likelihood to recommend Deloitte to others as a great place to work.

"Scaling the corporate ladder used to be the very definition of professional success. But organizational hierarchy is not what it used to be, nor is the corporate workforce. A paradigm shift is already underway—one in which the Corporate Ladder is giving way to the Corporate Lattice, and that *Mass Career Customization* is the framework for how work will get done and careers will be built in lattice organizations" (Deloitte, 2009).

Source: Deloitte LLP (2009) – [deloitte.com](http://deloitte.com)

Please see: [http://www.masscareercustomization.com/about\\_mcc.html](http://www.masscareercustomization.com/about_mcc.html) and  
<http://www.deloitte.com/dtt/article/0,1002,sid=153749&cid=216046,00.html> for more information.



**TREND 3: Where organizations will look to customize solutions, government will regulate standardization. Newly implemented or proposed federal labor law changes, especially health care reform, may re-position how organizations offer traditional and human capital benefits.**

**Issues to consider:** National labor law changes are occurring or are proposed: President Obama's plan for mandatory retirement (401K) plan participation, national health care reform, COBRA, Employee Free Choice Act, Ledbetter Fair Pay Act, The Serve America Act, and a proposed House bill for paid (accrued leave) FMLA. With these potential changes, organizations and benefits administrators need to prepare for impacts on individual business practices. The current administration's labor policies could impact the breadth and depth of benefits and services offered by organizations, by potentially adding standardization in the areas of union, leave, retirement, and health care participation and coverage.

President Obama's proposed "pay or play" health care reform, if implemented as currently discussed, could substantially change corporate offerings in diverse ways.

It is too early to tell what the overall impacts of the Obama administration's proposed plan will have on corporate based health coverage, however organizations must anticipate how they may respond to national mandates and how this change may or may not impact funds available for other benefits and work/life initiatives.

If the national proposed health reform plan is passed and organizations decide to "pay" and no longer offer organization based medical insurance, will they still focus on health and wellness initiatives? Furthermore, with national health plans on parity (through federal mandates); organizations will need to decide how to accent and differentiate their organization from the competition to recruit and retain needed talent. Furthermore, how will compliance with potentially new standardized regulations in retirement, union, health, and leave participation free up or monopolize monies traditionally used for benefits including established work/life benefit policies, practices and plans? Successful organizations will continue to strategically reduce health care and other benefit costs, while preserving long term sustainability, increasing their competitive edge, and driving healthy behavior change (and rewards) among employees.

**Suggested Readings:**

Hewitt Associates. (2009). *The road ahead: Emerging health trends 2009*. Lincolnshire, IL: Workforce Management Online. [www.workforce.com](http://www.workforce.com)

For Hewitt Report See: *Challenges for Health Care in Uncertain Times: Hewitt's 10<sup>th</sup> Annual Health Care Report*  
[http://www.hewittassociates.com/\\_MetaBasicCMAssetCache\\_/Assets/Articles/2009/Hewitt\\_2009\\_Emerging\\_Health\\_Trends\\_Survey\\_Report.pdf](http://www.hewittassociates.com/_MetaBasicCMAssetCache_/Assets/Articles/2009/Hewitt_2009_Emerging_Health_Trends_Survey_Report.pdf)

**TREND 4: Due to the current economic downturn, fewer resources are available for costly benefit administration, programs or pay increases. Organizations will think differently and innovatively about what other low cost benefits and programs of intrinsic value can be offered.**

**Issues to consider:** How can organizations create value and instill positive engagement in an era of downsizing, layoffs, and imposed reduced work schedules? In an age where employee engagement has never been more critical, organizations must find low cost, high touch ways to keep their employees focused on task, develop their people and reduce health, stress and absenteeism costs. Sustaining core values and effective communication during contractive times is critical. Constant communication with employees to use current work/life services provided by the organization and/or vendors, such as: 1) EAP, 2) resource and referral, 3) flexible work options, 4) child care initiatives, 5) preventative health, wellness, stress management, health clubs and assessments, as well as, 6) legal, estate and financial planning is critical during economic uncertainty and will continue to build trust. Organizations that rely on extensive and honest employee communication and use creative flexibility will be best able to weather the current economic storm. High performance organizations will look for ways to build trust, communicate value, recognize success, as well as address the work/life needs of workers in ways that are highly valued and improve morale while being cost neutral or cost negative.

Recently, a new phenomenon is gaining speed. Babies at Work is a low cost, high touch and positive impact program that is garnering attention nationwide as an initiative that can reduce stress and productivity costs.

### **Best Practice: Child Care**

#### ***Babies in the Workplace***

During the current economic downturn many companies cannot offer pay increases and are looking for ways to increase loyalty and provide high touch, caring work environments. Parenting in the Workplace or Babies at Work has worked surprisingly well for more than 120 companies with more than 1,400 babies successfully brought to work.

The majority of companies with babies-at-work programs limit the time babies can come to work to approximately 6 to 8 months of age (or crawling, whichever comes first) and set up policies, common courtesies and expectations. Employees who want to take advantage of the program meet with their supervisor, assign two other employees to be caregivers during meetings, and must sign liability agreements. Companies always reserve the right to cancel the program or individual situations.

Participating companies state that they have realized: 1) earlier return to work, 2) increased work hours, 3) greater retention of new parents, 4) greater loyalty, 5) higher morale, 6) attraction of new employees and clients, and 7) moderate productivity (estimated at 70-80% normal capacity.) The program is an incredibly cost-effective solution for organizations because parents provide all of the supplies and equipment for their baby and retain responsibility for their baby's care and well-being. The program is a very attractive option for businesses that cannot afford the liability insurance, regulatory compliance issues, direct costs for dedicated space, and hired care providers necessary with onsite child care.

The Parenting in the Workplace Institute provides consulting services and the following free downloadable documents: 1) notice to the public, 2) detailed business benefits, 3) CDC recommendations, 4) policy template, 5) HR/parent planning list, 6) explanation for personnel, 7) individual parent plan, 8) parent legal waiver, 9) fact sheet, 10) sampling of participating companies, and 11) alternate care provider form.

Sources:

Interview with Carla Moquin, President of Parenting in the Workplace and Babies at Work

Parenting in the Workplace website: <http://www.parentingatwork.org/> and <http://www.babiesatwork.org/>

Marquez, J. (2009, January). Parents discover babies in the workplace gaining acceptance. Workforce Management Online. <http://www.workforce.com/section/02/feature/26/10/54/>

**TREND 5: Baby Boomers and retirees will continue varying degrees of labor force participation due to insufficient financial assets and strong desire to contribute.**

Even if medical technology will be able to create a healthier and longer vital average lifespan, the idea of retirement (a life of relaxation, travel, gardening and golf, etc.) at 65 or even 70 as a reward for 40 or 50 years of hard work is not the future, not the historical norm, and may very well be a infinitesimally sweet and strange blip on the screen of human history.

The Employee Benefit Research Institute reports that half of all workers ages 45-55 have saved less than \$50,000 for retirement excluding the value of their home and any pension funds (Working Mother Magazine, 2008) and many others have seen a massive loss of retirement assets since last fall. The Federal Reserve states, "The average net worth of American families plunged 22.7% during the first 10 months of 2008, battered by the double slam of declining stock prices and home prices. Furthermore, there has been no let up in the erosion of net worth since October 2008" (The Federal Reserve, March, 2009).

Given the paltry savings of many, an unintended 20+ year retirement span (social security design flaw), a current economic disaster in terms of personal savings and assets, and a generation who has changed the rules since their inception; an AARP survey found that nearly 70% of 50 to 70 year olds expect to work in their retirement years, or never retire at all. Furthermore, a recent, February 2009 Towers Perrin Study found that 59% of corporate respondents report that their employees plan to postpone retirement in light of the current economy. "That's good news for employers faced with a shrinking labor pool, since HR experts predict demand for skilled workers to soar by at least 40% by 2012" (Working Mother Magazine, 2008).

Retirees and those about to retire will need to continue to work for fiscal reasons, as well as want, but they will be in the driver's seat and will negotiate their own terms. A MetLife survey found that nearly 70% of Boomers who plan to work in retirement say the desire to stay active, mentally challenged and engaged is the primary reason (Working Mother Magazine, 2008). Older workers will continue to offer their gifts and talents to the labor pool and organizations wise enough to engage them.

**Issues to consider:** Innovative organizations are crafting policies, programs and organizational structures (benefits, flexible work, career planning, work/life services) to meet the needs of older workers. How might a shift to retaining/hiring older employees shift or expand your array of work/life benefits, resources and support? How will it affect paid time off policies and wellness, health and fitness services, as well as eligibility or extension of health benefits? What types of work and career flexibility will older workers require: part-time work, phased retirement, consulting projects and networks, mentoring projects or "intergenerational knowledge transfers" (in person or virtual), on call availability, general schedule flexibility, virtual or telecommuting work, e-learning or virtual training, and/or tuition assistance? Organizations must also be aware and compliant with ADEA regulations and understand impacts on social security. Organizations will need to formally assess and evaluate the needs of older workers and fine tune their benefit packages, especially for part-time or "consulting-type" arrangements, perhaps customizing benefits for this particular group.

**Suggested Readings:**

Pitt-Catsouphe, M. and Matz-Costa, C. (2009, March). *Engaging the 21st Century Multi-Generational Workforce: A Study for the MetLife Mature Market Institute by the Sloan Center on Aging & Work at Boston College.*

See:

<http://www.metlife.com/assets/cao/mmi/publications/studies/MultiGenWorkforceStudy.pdf>

MetLife Mature Market Institute and David DeLong and Associates Case Studies (2009): Cisco Systems, Deloitte LLP, Pitt County Memorial Hospital, and Sodexo Health Care

See:

<http://www.metlife.com/assets/cao/mmi/publications/studies/MultiGenCaseStudies.pdf>

See also: MetLife and Generations United, (2009) *Generations in the Workplace: A Workbook for Engaging the Best Talent of All Ages.*

The Workbook is built around an Assessment of Corporate Intergenerational Systems© (ACIS©). Scores achieved on the Assessment provide action steps, tools and exercises that promote stronger intergenerational performance.

See:

<http://www.metlife.com/assets/cao/mmi/publications/studies/MultiGenWorkforceWorkbook.pdf>

Elder care will become an increasingly demanding issue for older workers as daily elder care or fiscal responsibility for an elderly or sick loved one is a concern for these workers, requiring innovative policy in addressing these needs. The future trend for employee elder care assistance is likely to dwarf the push for child care assistance for working women when first implemented in the 1980s.

Financial and life cycle assistance in the form of: 1) elder care subsidies, 2) financial and legal planning, 3) resource and referral services, and 4) in-home assessments, evaluation and home visitation programs may substantially increase. Organizations that cater to the workplace flexibility wants, as well as age specific needs of older workers will reap tremendous benefits as the looming labor pool shortage continues to be a concern across many industries.

### **Best Practice: Work/Life Policies**

#### ***Bright Horizons Back-Up Elder Care Services***

The Bright Horizons Back-Up Care Advantage Program provides access to back-up care for children, both well and mildly ill, as well as elders and adults through a nationwide network of quality, licensed child care centers, including hundreds of Bright Horizons child care centers, as well as in-home care provided by trained, licensed home health care professionals.

Results from *The Lasting Impact of Employer-Sponsored Back-Up Care*, a 2008 Bright Horizons study of approximately 100 users of the elder care back-up component found:

Participants using elder back-up care overwhelmingly state that program availability reduces stress, increases loyalty and retention, reduces absenteeism, and increases productivity. Employees who used this service report a positive impact on: 1) concentration (97%), 2) job performance (87%), 3) ability to meet the demands at work by providing good customer service (83%), 4) working longer hours (75%), 5) pursuing or accepting a higher position (65%), 6) continuing work for employer (63%) and 7) more likely to recommend employer to others (62%). Participants were also able to work an average of 10 days that they would have otherwise not been able to over the past six months because of access to adult/elder care.

Who uses the service?

- More than half were professionals, management, or in leadership/ executive positions. More than a quarter was administrative and support staff. In addition, 73% had been with their organization for five years or longer, 36% were older than 50, and 57% were between 36 and 50 years of age.
- Sixty-two percent used back-up care for a parent and 8% used the program to support a spouse or partner.
- Care was provided for adults whose normal care arrangement was: 1) Independent/cares for self (33%), 2) care by a family member (24%), 3) caregiver comes to the home (24%), 4) assisted living facility/nursing home (10%), 5) other (5%), 6) hospice care (3%), and 7) adult day care/senior/community center (1%).

Prevalence: According to the Wall Street Journal (2006), backup adult-care benefits are offered mainly by large companies with more than 500 employees. The Society for Human Resource Management survey, *Benefits Survey Report* (2008) found that 20% of employers offered elder care referral services, and 5% offered backup elder care services. Organizations that contract with Bright Horizons for emergency elder care pay an annual fee based on employee utilization. Companies might offer the service to employees for free, or charge a co-payment, typically about \$4 an hour. By comparison, private agencies that provide such backup care may charge about \$15 an hour (varies across country).

ROI: Why should companies consider back-up elder care a best practice? Because lack of quality alternatives for dependent care impacts an organizations' productivity and bottom line. The 2006 MetLife Caregiving Cost Study found that absenteeism due to dependent care issues cost U.S. employers more than \$5 billion (at \$320 per employee) on an annual basis. Partial absenteeism racked up a bill of nearly \$2 billion (at \$121 per employee). Crises due to elder care issues accounted for a \$3.8 billion loss (at \$283 per employee). Finally, AARP estimates that stress from adult/elder care responsibilities impacts productivity at a \$2,110 loss for every full-time working caregiver annually.

Sources:

Bright Horizons, executive interview and website: <http://www.brighthorizons.com/programs/backupcare.aspx>

McQueen, M.P. (2006, July 27). *Employers expand elder-care benefits*. Wall Street Journal. Accessed at: <http://www.post-gazette.com/pg/06208/709069-28.stm>

Society for Human Resource Management. (2008) *Benefits Survey Report*

**TREND 6: Younger workers desire employment with “socially conscious” organizations and work that includes “service opportunities.”**

Research shows that Generation Y wants and expects to work for companies and organizations that are socially conscious and this generation, more than the others, wants the opportunity to volunteer and give back to their communities and the world.

An online study of 1,800 young people by Cone Inc. and AMP Insights suggests this generation is comprised of “the most socially conscious and civic minded consumers to date”, as 61% of 13 to 25 year olds feel personally responsible for making a difference in the world. This report (2006 Cone Millennial Cause Study) states that: 1) 81% have volunteered in the past year, 2) 69% consider a company's social and environmental commitment when deciding where to shop, and 3) 83% will trust a company more if it is socially/environmentally responsible. Furthermore, of the 28% of respondents employed full-time: a) 79% want to work for a company that cares about how it affects or contributes to society, b) 69% are aware of their employer's commitment to social/environmental causes, c) 64% say their company's social/environmental activities make them feel loyal to that company, and d) 56% would refuse to work for an irresponsible corporation (coneinc.com). Furthermore, a 2005 survey of 263,710 students at 385 U.S. colleges and universities (conducted by the Higher Education Research Institute at the University of California at Los Angeles) found that, “two-thirds of college freshmen (66%) believe it's essential or very important to help others in difficulty.” This report found feelings of social and civic responsibility among entering freshmen at the highest level in 25 years (heri.ucla.edu). As this young and capable workforce enters the workplace they will seek to transfer their personal commitment to social good into positive work experiences.

**Issues to consider:** Members of this generation are eager to be a part of innovative companies that leverage their resources to make a significant impact through corporate social responsibility. They are interested in working for companies that have branded themselves as socially responsible and not just “talk the talk, but walk the walk.” Younger workers are looking for companies and organizations that offer leave for volunteer service and especially paid volunteer leadership opportunities.

The newly signed (April 2009) Serve America Act is intended to improve opportunities for people of all ages to serve and volunteer. The program has been expanded to encourage young people to serve early in life and to “put more and more youth on a path of lifetime service.”

The Serve America Act is also intended to encourage employers to let employees serve by establishing employer tax incentives to allow employees to take paid leave for full time service. It also has established the “Volunteers for Prosperity” program, which will organize and coordinate short-term international service opportunities for skilled professionals to serve in developing nations.

**Best Practice: Leave, Flexibility and Volunteerism and Service**

**IBM Service Corps.**

This innovative model engages IBM employees to volunteer their time and expertise internationally to struggling organizations located in countries and emerging markets where IBM plans to develop a stronger footprint. Other companies are doing similar work, but IBM is the first to combine international community service and team leadership development in one program. Over the next three years, IBM will donate \$250 million of time and services to this initiative.

In 2008, the competitive program selected 600 applicants for work on six one month-long teams from a pool of 5,500 applicants. The program encourages IBM employees to volunteer in a way that provides meaningful impact, but it also reinforces IBM's commitment to international volunteerism. The teams are working together and garnering invaluable leadership and problem solving experiences in Brazil, China, Ghana, Malaysia, Romania, Tanzania, The Philippines, South Africa, Turkey and Vietnam.

Source: Hymowitz, C. (2008, August 4). *IBM creates volunteer teams to cultivate emerging markets*. New York, NY: Wall Street Journal. Accessed: <http://online.wsj.com/article/SB121779236200008095.html>

IBM website: <https://www-146.ibm.com/corporateservicecorps/>



**TREND 7: Flexibility will continue to be highly desired by employees of all age groups. Resilient organizations will continue to push the boundaries of flexibility by fundamentally restructuring work.**

**Issues to consider:** Even during a very tough recession, flexible work practices continue to grow in popularity among users, potential users and organizations. According to the 2009 *Annual Work+Life Fit™* Reality Check (a telephone survey of a national probability sample of 757 full-time employed adults, sponsored by Work+Life Fit, Inc. and conducted by Opinion Research Corporation March 26 – 30, 2009), most companies continue to offer the same or an increased amount of flexible work opportunities, and most employees report their flexibility use has either increased (19%) or stayed the same (66%) during the past year. “Regardless of economic boom or doom, work/life flexibility is here to stay,” states Cali Williams Yost, CEO, Work+Life Fit, Inc. “Now we have to figure out how to use flexibility to help manage our businesses and our lives, both of which are forever changed by this recession.”

The truth is organizations are looking at flexible work practices as a way to cut operating costs during this economic downturn and employees are willing to oblige. According to the 2009 *Annual Work+Life Fit™* Reality Check Survey, “In order to save their jobs and help their employers reduce costs, nearly 8 in 10 employees are willing to work a compressed work week, while nearly 60% would take additional unpaid vacation days or furloughs (several weeks off without pay). Nearly half would share their jobs with colleagues (48%), or take a cut in both pay and hours (47%). A little more than 4 in 10 would take a pay cut but work the same amount of hours or switch to a project-based, contractor employment status (41%). Just under a third report they would take a month or more unpaid sabbatical” (Yost, 2009). One caution with flexibility is “flexibility for whom?” Research shows that the lowest wage jobs are the most flexible, from the employer point of view. They are least flexible, from the employee point of view (See Flexibility Discussion in Section 1).

With the current economic downturn, many businesses are implementing or forcing flexibility to reduce costs, but there is a silver lining. Companies that have used flexibility during down times may experience less future resistance from managers, having experienced, and successfully managed flexibility during difficult climates. After the recession, it is likely that those working flex schedules during the recession may still request and garner flexible options going forward. The good news is organizations may begin to stretch the boundaries of flexibility and inclusiveness even more and reward employees with new ways to work during the upcoming good times.

Some organizations have taken the next step beyond flexible schedules to re-structuring work itself. Many of today’s flexible work practices are essentially topical applications patching the emerging holes in the underlying assumptions and structures built for yesterday’s homogenous workforce. The need to move beyond these band-aid solutions is extremely difficult, yet vital. Restructuring work to create nimble and resilient organizations in this Millennium requires deep re-thinking, undoing of current or old assumptions and orthodoxy, re-examination of required processes and outputs, commitment to inclusiveness and a fundamental understanding of the next potential labor and economic shifts, as well as business imperatives.

**Suggested Readings:**

Two very recent publications provide extensive resources and company profiles and are a must read for practitioners looking for new ideas or how to implement flexibility in their organization:

Galinsky, E., Eby, S. and Peer, S.L. (2008). *2008 Guide to bold new ideas for making work work*. New York, NY: Families and Work Institute: 85 pages. Provides approximately 70 pages of recent profiles and case studies on flexibility.

See: <http://familiesandwork.org/3w//boldideas.pdf>

Roundtree, L. and Lingle, K. (2008). *Workplace flexibility: Innovation in action*. Scottsdale, AZ: WorldatWork and AWLP. 61 pages. In depth discussion of the traditional flexibility spectrum and options, organizational drivers, business case data, how to build a culture of flexibility, and numerous flexibility profiles. Provides a thorough discussion of the special needs and considerations of academia in regards to flexibility, tenure, leave polices, and culture.

See: <http://www.worldatwork.org/waw/adimLink?id>.



## Best Practice: Restructuring Work

### *ROWE and Best Buy Results Only Work Environment*

ROWE is revolutionary thinking in redesigning and transforming the industrial model to a truly energized and self managed workforce. True workplace innovators and revolutionaries, Cali Ressler and Jody Thompson created ROWE through their experience with Best Buy and their consulting group CultureRX. ROWE (Results Only Work Environment) is a radical ideology which aspires to reshape the workplace by redefining the very assumptions and nature (place and time) of work itself. In ROWE divisions, the assumptions about work, hours and traditional norms are turned upside down or discarded providing workers with unparalleled opportunities to manage their work and personal lives.

From the CultureRX website:

“ROWE is a bold, cultural transformation that permeates the attitudes and operating style of an entire workplace, leveling the playing field and giving people complete autonomy, as long as the work gets done.”

With ROWE:

- There is no need for schedules or mandatory meetings
- Nobody feels overworked, stressed out or guilty
- People are where they need to be, when they need to be there
- People at all levels stop wasting the company's time and money
- Teamwork, morale, and engagement soar
- There's no judgment on how people spend their time

“ROWE is all about results. No results, no job. It's that simple.”

Basically, we're rewiring people's brains, getting rid of an old belief system from the 1950s that is no longer relevant to the technologically advanced business world we have now,"

Thompson says. "We want people to stop thinking of work as someplace you go to, five days a week from 8 to 5, and start thinking of work as something you do." (Thompson in Kiger)

**Metric results:** ROWE's focus is not on face-time or appearances but on inclusiveness, outcomes and results! Since Best Buy began switching to ROWE in 2002 on a division-by-division basis, 60% (2,400 of the 4,000 people at its headquarters campus) have converted to this results based way of working.

ROWE demonstrates significant impacts. Employees in divisions that converted to ROWE report that they have better relationships with family and friends, feel more loyal to the company, and feel more focused and energized about their work. ROWE teams, such as those at Best Buy, have improved workforce productivity (up to 41%) and reduced voluntary turnover rates (as much as 90%), saving these companies millions.

The per-employee cost of turnover at Best Buy is \$102,000, and ROWE teams have 3.2% less voluntary turnover than non-ROWE teams. Once Best Buy's 4,000-person headquarters is completely converted to ROWE, the company estimates saving about \$13 million a year in replacement costs.

Sources:

Ressler & Thompson, [www.culturerx.com](http://www.culturerx.com)

Kiger, P.J. *Throwing out the Rules of Work*. Workforce Management Online.

See: <http://www.workforce.com/section/09/feature/24/54/28/index.html>

In a ROWE, people do whatever they want, whenever they want, as long as the work gets done.

In the park, in a coffee shop, in the shower.  
At midnight or 3 a.m. or on Sunday.

Whenever and wherever.

Even receptionists? You bet.

Even retail associates? YES!

Hospitality workers? Why not?

Jobs traditionally driven by the time-clock?

YES!

The clock doesn't control you, you control the clock! Management can stop monitoring the hallways, and focus its energy on the business.

**TREND 8: “Greening” the workplace. Sustainable green technology will be used to re-design conventional workspaces to employee driven, cost effective, flexible, virtual work-share spaces.**

**Issues to consider:** Organizations are re-thinking the way employees use space by focusing on *how* and *when* space could be used rather than allocating *how much space* is “needed” or designated for certain employees (especially related to hierarchical status). “Poorly designed workspace has a direct impact on employee retention” (Costello, 2007) and cutting costs reigns supreme in an economic downturn.

**Suggested Reading:**

Costello, M.R. (September/October 2007). Staying on: Employee retention by design. *The Leader: Real Estate Management*. CoreNet.

According to the 2007 CoreNet Global survey, the physical location of employee work has become so fluid that 65% of responding Fortune 500 firms indicate they have eliminated assigning work space to at least 10% of their workforce. Furthermore, 73% of these Fortune 500 firms indicate they have introduced desk sharing or unassigned workstations, and 60% introduced or increased “hoteling or “hot desking” concepts” or “drop in spaces” for employees (Costello, 2007). The future trend will be to design employee driven, cost effective, flexible, virtual work-share spaces. How can your organizational space be best utilized for creativity, collaboration, renewal and attraction and retention? Resilient companies are creating: 1) “open area, open thought” spaces, 2) informal satellite offices, 3) hoteling and hot desking practices, 4) idea labs, 5) virtual spaces, and other grassroots solutions. Again, successful organizations will consider how to “move work to people instead of people to work” (Ware and Grantham, 2003).

Another big push will be in making these spaces green (environmentally conscious) and flexible using renewable or energy efficient technology. Private offices and cubicles for employees and managers are relics of the old ways. “Plug and play” technology will need to be available in ways that can be adapted to new and malleable physical configurations. Organizations will also need to consider how to create workplace environments that can leverage talent and engagement using location independent strategies.

We are at the end of the “age of oil” and new economy organizations will implement more virtual work and tele-work opportunities, using new palm held and laptop videoconferencing technologies. It is estimated that the future will see many corporate “headquarters” disappear or shrink dramatically in size. Decentralized and smaller corporate or organizational workplaces, as well as more and more telecommuting will be the norm. Currently, for example, the Minneapolis Urban Partnership is working with local corporations to expand the use of the ROWE program, (among other initiatives) to assist corporations in implementing telecommuting to reduce traffic emissions and congestion. The region is home to over 20 Fortune 500 companies and 33 Fortune 1000 companies. The goal is to reduce 500 daily peak period trips through the region’s main traffic corridor (Minneapolis Urban Partnership, 2009).

**Innovative & Green Workspace Design Ideas:**

- Lightweight, portable, comfortable and ergonomic furniture
- Day lighting – floor to ceiling windows, sunlights
- “Plug and play” technology for evolving physical configurations (paneled wall, columns, ceiling or under floor mounted access)
- WiFi or wireless– internet connectivity for laptops, phones, and printers
- Cellular reception
- VoIP (voice over internet protocol) technology  
Example: Skype.
- Home like atmospheres and attractive artwork
- Pleasing colors and textures
- Energy efficient and ecologically sound products and technology
- Low-tox or no-tox materials
- Outdoor views
- High indoor air quality and ventilation (HVAC)
- Noise and temperature control
- Portable solar tech applications when available

Nimble organizations will facilitate and integrate agile human capital management, human resources, facilities management, IT practices and urban planning together to create nimble, virtual, resilient and workable workspaces.

**TREND 9: Community matters both at the micro and macro levels. As the world becomes more virtually connected, humans will reach out for the smaller and more intimate definition of community, and will choose “where to live” over “where to work.” Understanding what different generations are looking for in their lifecycle and providing those services is critical to attracting workers, families and business opportunities. Beyond creating corporate branding of community, becoming a “community of choice” or “best place to live” environment will be the new catch phrase and desired status for both organizations and regional economies.**

From the micro level – a community of colleagues, to community within physical work buildings, to community within organization – all the way to the regional economy where people work and live ...community matters! As the world becomes more virtually connected, humans will reach out for the smaller and more intimate definition of community. Beyond creating corporate branding of community, becoming a “community of choice” will be the new catch phrase and desired status for regional economies. Gen X and Gen Y will continue to choose community over work. They already are doing so. The younger generations are choosing where to live first, and then choosing employment or work opportunities where they reside or virtually (Future of Work, 2009).

**Issues to consider:** Businesses (and academia) have been branding their communities for employees and customers (students) for decades. The focus has been on branding their organizations as “great places to work”, or “100 best”; aspiring to create and welcome employees and (students) into innovative and inspiring workplaces where workers (and students) want to work and stay. Traditional work/life benefits have been an integral part of creating this community. However, community is now moving to the macro level as well. Community development and economic planners would be wise to pay attention to this trend and look beyond the physical attributes of their region (weather, recreation, cleanliness, livability), as well as infrastructure (internet access, roads, schools, hospitals, airports, services, security, retail and cultural attractions) to other “best places to live” qualities such as the availability of community work centers, the “third places” where work gets done (coffee shops, book stores, airports, suburban or HOA community centers, conference centers or local “hourly rented” client meeting space) that are attractive to workers and their families.

“It is a bit of ‘if you build it they will come’ – meaning if your community is attractive to talented folks, they’ll come, settle down, raise their kids, bring their work with them, and drive local economic growth just by being there (they’ll import revenue by exporting their work, and then spend their income locally).”

(Grantham, C. and Ware, J., *Closing the Talent Gap: Companies and Communities Team up* in Real Estate Management, September/October 2007 )

The old economic development model focused on providing financial incentives to corporations to locate their business in the target region isn’t enough or appropriate anymore. In our information based, talent driven, virtual service economy, local communities must become attractive to talent and families! Understanding what different generations are looking for in their lifecycle and providing those invaluable services (for example: quality child care and elder care) is critical (Israel and Warner, 2008). Research indicates that non-boomers are choosing smaller cities and quality of life environments over the big cities (Future of Work, 2009).

“Retirees” are also now looking for great places to start their next phase in life and in work. Smaller cities and communities that are recognized as “great places to live” will see growth in potential worker populations. Workers, young and old, will choose to live where they feel they can exercise autonomy, feel part of a meaningful sense of community and where the quality of life or psychology of the region melds with their culture and current life stage. Communities that are designed to meet needs across the lifecycle will be the most resilient.

**Conclusion:**

The current economic downturn has had a substantial impact on the innovation of new work/life policies, programs and practices; limiting the development of new ideas and solutions as many organizations are currently faced with cutting operational costs, imposing reduced schedules and are in the mode of just trying to survive.

However, some new ideas have trickled up during these difficult and unstable times. A convergence of unprecedented factors and trends outlined in this paper, is positioning our society to overturn old industrial modes of working and to embrace new innovations and structures that are fluid, emerging, resilient, renewable. The challenge is to develop practices that promote flexibility for employer and employee, and enable workers to be both caregivers and workers (Gornick and Meyers 2003). Strong communities are the basis for a prosperous economy. The economy needs employers who recognize their role in enabling an integration of work, family and community life.

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Appendix A

**Preparing for the New Century:  
Innovative Work and Family Strategies**

**Hosted by Cornell University**

**June 3 - 4, 2009  
ILR Conference Center, Cornell University  
Ithaca, New York**

With the focus on career/life integration, now is the time to prepare employers for the change necessary to sustain a commitment to child care options, robust work/life policies, and creative approaches to “balance” work responsibilities and the changing personal and family commitments of our employees.

Through facilitated discussions, this program will provide participants with the new research on work and family issues, as well as practical applications to provide the foundation for innovative strategies.

**June 3, 2009  
12:00 Noon – 5:00 PM**

**Lunch** (12:00 PM – 1:00 PM)

**Welcome:**

*Mary George Opperman*, Vice President, Human Resources  
Cornell University, Ithaca, New York

**Overview of Program and Goals:** (1:00 PM – 1:20 PM)

*Mildred Warner*, Professor, City and Regional Planning and  
Co-Director Linking Economic Development Child Care Project, Cornell  
University

*Lynette Chappell-Williams*, Director, Office of Workforce Diversity, Equity and  
Life Quality, Cornell University

Vivian Relta, Associate Director of Facilitation for Cornell Interactive Theatre  
Ensemble, *Cornell University*

**Introductions around the Room** (1:20 PM – 1:30 PM)

**Break:** (1:30 PM – 1:45 PM)

**Discussion I: An Overview of Effective Work/Life Policies** (1:45 PM – 3:15 PM)

*Jennifer Glass*, Professor, Policy and Management,  
Cornell University

*Carolyn Heinrich*, Professor and Director of the La Follette School of Public  
Affairs, University of Wisconsin

*Brad Harrington*, Professor, and Executive Director for the  
Center for Work & Family, Carroll School of Management, Boston College

*Michael Layman*, Manager, Employment and Labor, *SHRM*

**Break:** (3:15 PM – 3:30 PM)

**Discussion II: Restructuring Work to Support Work/Life Integration**  
(3:30 PM – 5:00 PM)

*Jennifer Swanberg*, Associate Professor, College of Social Work,  
Gatton College of Business & Economics & College of Public Health, Executive  
Director, Institute for Workplace Innovation, (iwin), *University of Kentucky*

*Julia Henly*, Associate Professor, School of Social Service Administration, Center  
for Human Potential and Public Policy, University of Chicago

*Barbara Gniewek*, Principal and National Practice Leader,  
Deloitte Consulting

*Cali Yost*, CEO,  
Work+Life Fit, Inc.

**Preparing for the New Century:  
Innovative Work and Family Strategies**

June 4, 2009

8:00 AM – 12:15 Noon

**Continental Breakfast:** (8:00 AM – 8:30 AM)

**Discussion III: Financial Support for Dependent Care** (8:30 AM – 10:15 AM)

*III. A Cornell Child Care Program*

*Karen Shellenback, Consultant*

*Mildred Warner, Professor, City and Regional Planning,  
Cornell University and Co-Director of Linking Economic Development  
and Child Care Research Project, Cornell University*

*Lena Hipp, PhD Candidate, Industrial and Labor Relations  
Cornell University*

*III. B NYC – Child Care Program*

*Moira Dolan, Assistant Director, Public Policy, District Council 37*

*K C Wagner, Director-Workplace Issues, School of Industrial and  
Labor Relations, Cornell University*

**Break:** (10:15 AM – 10:30 AM)

**Discussion IV: Creative Care Options** (10:30 AM – 12:00 PM)

*Michelle Artibee, Associate Director for Work/Life Programs, Office of Workforce  
Diversity, Equity and Life Quality, Cornell University*

*Nancy Bereano, Founding Member, Tompkins County Working Group on LGBT  
Aging, Ithaca, New York*

*Myra Sabir, Assistant Dean, College of Arts & Sciences, Cornell University*

*Lynette Chappell-Williams, Director, Workforce Diversity, Equity and Life Quality,  
Cornell University*

**Wrap Up:** Lynette Chappell-Williams and Mildred Warner (12:00 PM – 12:30 PM)

**Lunch:** “On the Run” (Box Lunches Provided)

## Appendix B

### Child Care & Cornell Child Care Grant Subsidy Program Survey: Impact on the Cornell Community Summary Report

Karen Shellenback

July 22, 2009

#### Executive Summary

*“Cornell's continued commitment to improving the struggle of work/family relationships makes me proud to work here. It makes me perform my duties above and beyond.”*

Cornell University created a new employee benefit of child care subsidies for employees (Cornell Child Care Grant Subsidy Program or CCCGSP) in 2001. Available on a sliding income scale, the grant is administered through the Flexible Spending Account (FSA) and can be used to pay for any form of legal child care including child care centers, preschools, summer camps, licensed family child care homes, and individual care providers. Children up to age twelve and households with incomes under \$150,000 are eligible for assistance (dependents over age 12 must have special needs in order to qualify). In 2009, Cornell awarded \$1,660,000, which served 882 Cornell faculty and staff families. The university extended coverage to post doctoral associates and graduate students in 2004. In 2008, the university further extended coverage to provide supplemental child care grant funding to users of the Cornell Child Care Center (with a household income of up to \$85,000).

***I've received a CU child care grant for about 8 years running, now, and I almost cannot begin to express what a difference it has made in making access to good quality child care available to our family. I've been extremely grateful for the CU Child Care Grant Program for this. The CU Child Care Grant Program has not only contributed to the quality of my work experience at CU, but has made me proud to be working for an employer that does walk the walk in terms of building healthy community.***

The first evaluation of the program and its impacts was conducted in 2007 and is repeated in this 2009 study. The 2009 evaluative online surveys collected in-depth information on Cornell employees' ideas regarding the CCCGSP, both those who had received grants and those who had not. Evaluators were particularly interested in grant recipients' perceived impacts of the grant program on the quality of child care their children receive, as well as grant recipients' productivity at work. This evaluative online survey also asked questions regarding the design, implementation and administration of the program, as well as strategies for improving it. While increased funding can increase parental effective demand for child care, program designers were interested to know if there is an effect on the quality of care and on employee's relationship to Cornell.

Below are the primary questions this research sought to answer:<sup>3</sup>

- Q: Do parents, when given subsidies for child care, choose higher quality care?

A: Yes, many choose higher quality care, especially those who couldn't afford high quality care otherwise. Just under 30% report that the CCCGSP directly increased the quality of their child care

<sup>3</sup> Note: The answers are based on respondent percentages and open-ended comments and have not been tested for statistical significance nor do they imply a causal relationship.



arrangements and 22% report that the grant helped them enroll their children in desired programs. Of respondents who changed their arrangements because they applied or received the Cornell grant, 70% indicated that their new arrangement was of higher quality.

- Q: Does the additional money for child care allow families to change their type of care arrangement or afford after-school programs or summer camps? If so, do parents feel that their new arrangement is of higher quality?

A: Yes, for some. Almost 12% of respondents changed their arrangement due to the grant. Almost one-fifth (19.8%) did enroll their kids in summer camps, sports or other enrichment programs because of the grant and many comments illustrate that grant monies provided school-agers and their families with enriched or expanded summer care experiences. Furthermore, 41% of respondents reported that the grant money expanded the number of possible child care arrangements considered or accessed.

- Q: Compared to their past arrangements, are parents more likely to choose regulated over unregulated care?

A: Somewhat. Ten percent of respondents commented that they moved their child from unregulated to regulated care. However, approximately 86% of respondents believe that the freedom to use funds for any type of legal care is an important strength of the grant program.

- Q: Do extra child care funds allow families to maintain an arrangement they prefer?

A: Yes. Nearly all respondents reported that the grant helped pay for child care. Twenty-one percent report that the grant provided more hours of care and another 20% report that the grant helped increase the reliability of their care.

- Q: Do additional monies free up funds for families to address other quality-of-life issues, such as buying a new computer or taking a family vacation?

A: Yes, 65% believe the extra grant money freed up money for other family activities.

- Q: Do employer-sponsored child care programs help recruit and retain employees?

A: Yes! Approximately 70% of respondents indicated that receiving a child care grant positively influenced their decision to continue working at Cornell. One in five responded that the program allowed Cornell parents to return to work after the birth of their child. Numerous comments indicate that the CCCGSP helps to recruit and especially retain employees. Furthermore, three-quarters of respondents (74.2%) report that receiving the grant has increased their dedication or loyalty to Cornell.

- Q: Does an improvement in the quality, stability, or reliability of child care arrangements affect employees' concentration and productivity at work?

A: Yes! Almost three quarters (72.6%) of respondents reported that receiving the grant had somewhat or significantly decreased their work-family stress. Furthermore, numerous comments throughout the survey indicate that maintaining stable, reliable and high quality child care arrangements positively impact employee concentration, engagement and productivity at work.

Overwhelmingly, respondents who have used the CCCGSP are grateful and satisfied with the program although more funds would be graciously welcomed by all. Many employees also request more institutional communications and support for flexibility. Want to know more about what Cornell parents think about the current state of child care and Cornell’s support for working families? ... Read the attached summary report.

**Methods:** An online survey was designed and developed by a multi-disciplinary work group composed of Human Resource staff, faculty, graduate students, staff from the Survey Research Institute (SRI) at Cornell, and an independent consultant. The survey consisted of the core questions asked of Cornell employees in the original 2007 study, as well as a few new questions. Participants were identified through Cornell Human Resources records as: 1) having dependent children up to age 12 and/or 2) past or current Cornell Child Care Grant Subsidy Program (CCCGSP) participants and were contacted via email. Invitation e-mails were sent out by SRI on February 13th, 2009 followed by reminder e-mails to non-respondents on February 18th, February 25th, March 5th, and finally March 17th, 2009. Web data collection ended on March 25th, 2009. In addition to the web completions, there were 28 surveys filled out on paper by employees without access to computers at their worksites. SRI entered the data from paper surveys into the web instrument on March 27th, 2009. 1,051 survey responses were collected out of a possible 2,564 with valid email addresses yielding a response rate of 40.99%. The results also captured 1,141 comments. Results (frequencies and percentages) in this report have not been tested for statistical significance.

**Overall Survey Results: All Respondents**

Respondents were asked if they have ever heard of the Cornell Child Care Grant Subsidy Program; 92.3% of respondents (N = 1,051) indicated that they have heard of the program. Over one-third (37.2%) reported that they learned about the grant program from a co-worker and another 36% reported that they learned about the program from an email announcement from university or unit HR.

**Children:**

Almost all respondents (97.6%) indicated that they have children under age thirteen living with them or for whom they have partial custody (N = 1,051). Just over half (52.1%) of Cornell parents have one child, another 40.7% report two children and 7.1% report having 3-5 children under age 13. Only 6.3% of parents report that at least one of their children attends Head Start or publicly funded pre-kindergarten (N = 1,020). Just over 1,600 children were reported.

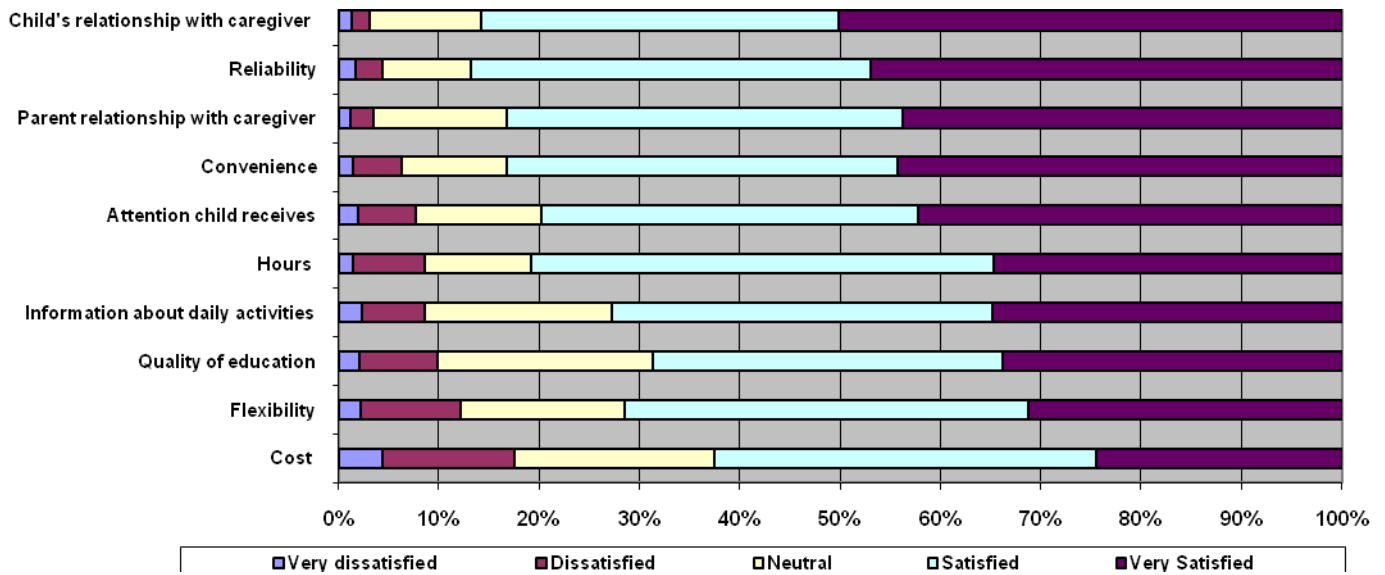
*Table I: Frequency and Percentage of Children Reported by Age Group*

1,601 children were reported		
Age group	Frequency	Percentage of all children reported
Infants (0-17 months)	209	13%
Toddlers (18-36 months)	227	14%
Pre-school/pre-kindergarten (3-5 years)	341	21%
School-Age (5-12 years)	824	52%

The following chart indicates respondent level of satisfaction with each of the following child care issues. Parents were asked to respond in terms of their youngest child’s child care experience. Parents are most satisfied with the youngest child’s relationship with caregiver, reliability and parent

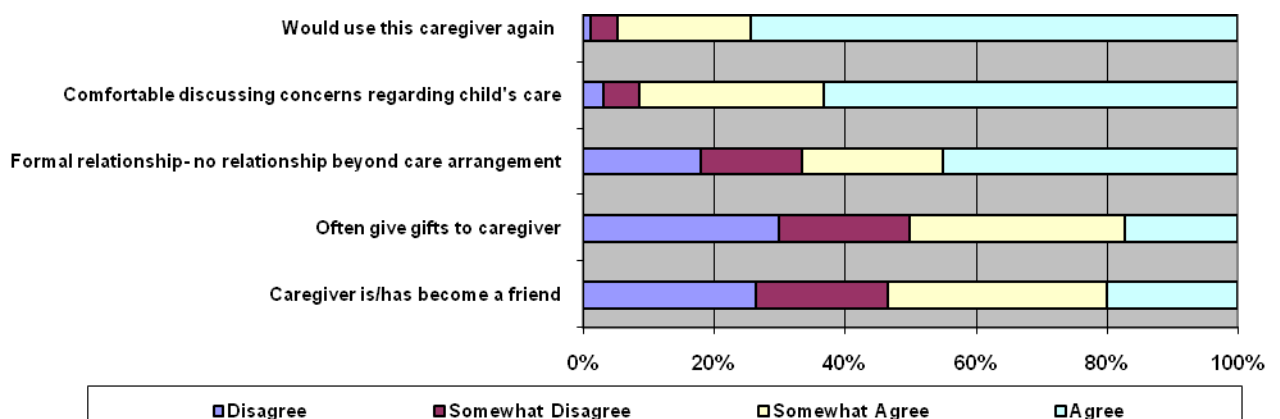
relationship with caregiver. Parents are least satisfied with cost, flexibility and quality of education of their youngest child’s care.

Chart 1: Parental Satisfaction with Child Care Issues for Youngest Child



Parents were asked to think about their relationship with the paid caregiver of their youngest child and indicate agreement or disagreement with the following issues. Almost all parents report that they would use their caregiver again (94.7%) and feel comfortable discussing concerns regarding their child’s care (91.4%). Approximately two-thirds (66.47%) agree that their relationship is formal, yet approximately 53.36% of parents report that the caregiver of their youngest child is a friend and another 50% report that they often give this care provider gifts.

Chart 2: Parental Relationship with Paid Non-Relative Caregiver of Youngest Child



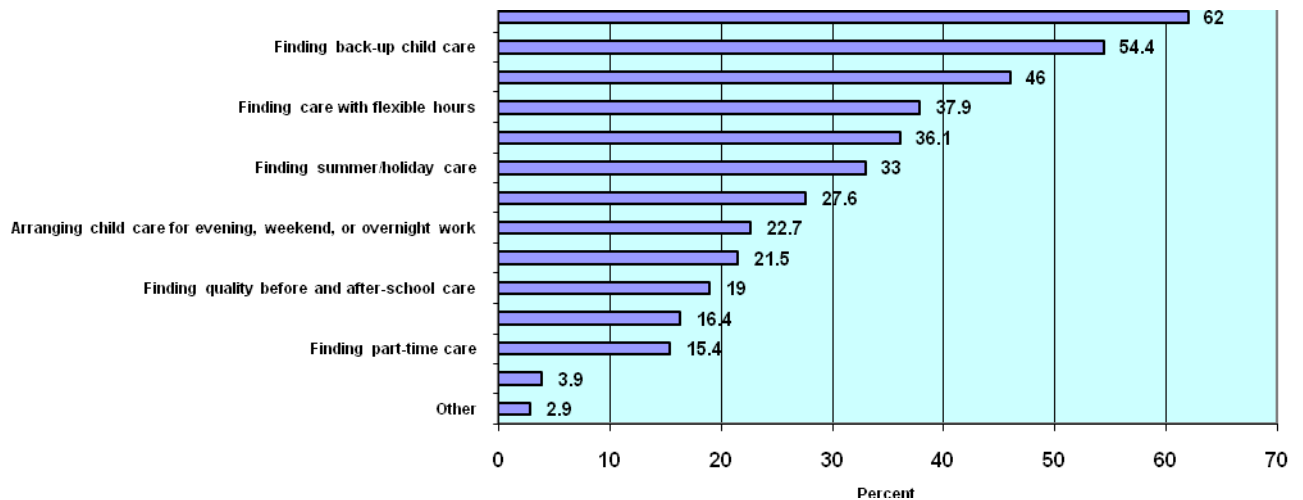
Participants were asked, “On average, how often is your child caregiver unable to care for your child(ren) and you must find another arrangement?” Approximately 18% replied “never”, 18% replied “once or twice a year”, 20.3% replied “three or four times a year”, 21.5% replied “five or six times per year” and 22.5% replied at least once a month (includes responses of once (9.3%), twice (6.1%), three

(2.7%) or four (4.4%) times or more a month)(N = 1016). The majority (82.4%) of survey respondents indicated that they are personally responsible for back-up care when their child care provider is closed or their child is sick (N = 1,026).

Cornell parents face challenges regarding child care, especially finding affordable care (62%) and finding back-up care (54.4%). Almost one-half (46%) of parents report difficulty finding high quality child care. Finding flexible hours (37.9%) and conveniently located care (36.1%) are also issues for

Cornell parents (N = 1,026). “Other” comments (N = 28) included problems finding care for children with special needs, especially medical and behavioral issues (six comments).

*Chart 3: Parental Challenges Regarding Child Care*



When the above “child care challenge” data is cut by household income some interesting findings emerge. Overall, difficulty finding high quality child care increases as household income increases. Furthermore, difficulty finding affordable care increases as household income decreases.

Almost two-thirds (62.6%) of respondents have applied for a grant from the Cornell Child Care Grant Program (N=1,022). Of those who did not apply for the grant (37.4%), 35.3% replied that they are not eligible, 23.6% replied that they were unaware of the program, 14.9% missed the application deadline, 9.7% responded that the amount of money was not worth the time, 9.4% did not want to sign up for a select benefits dependent care account which is required, and 5% indicated that the application was too burdensome. Over one-fifth of respondents (20.9%) indicated that there were “other” reasons why they did not apply: 17% simply felt that they were not eligible, 12% use unqualified care, 12% have a spouse at home, 11% commented that they felt they have “no need” and 9% responded that they do not know enough about the program.

### **Survey Results: Respondents who have Received the Cornell Child Care Grant**

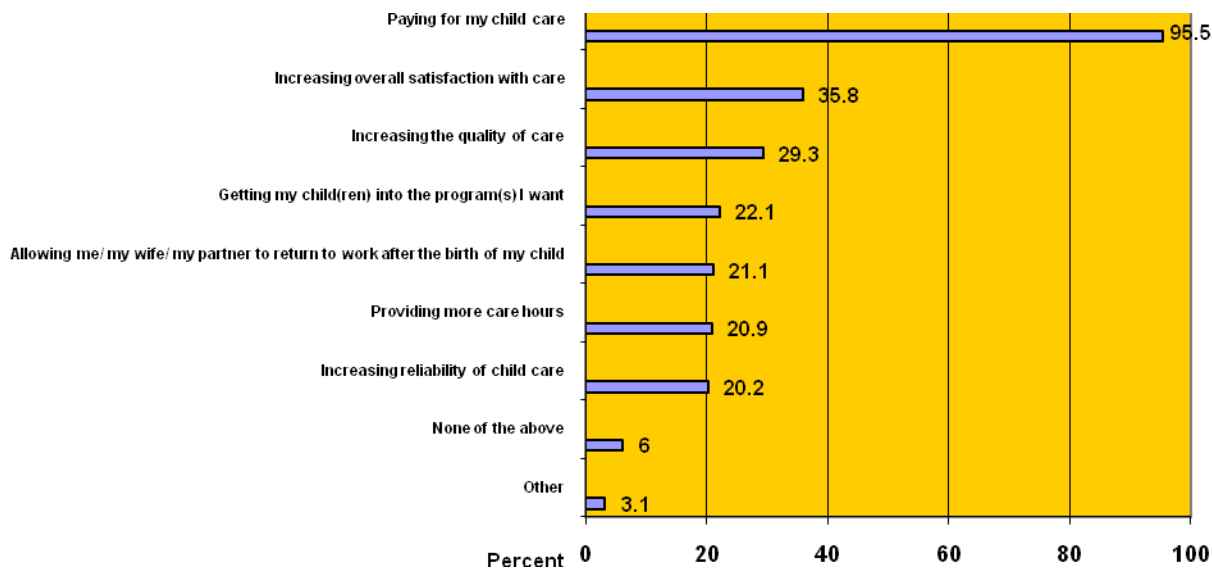
Over one-half (58.9%)(619) of all survey respondents (N=1,049) report that they have received a Cornell Child Care Subsidy Grant. Of those who have applied for a grant, 96.4% report that they have received a grant. Of those respondents who have ever received a grant, 82.2% (505) received a grant in 2009. Of those who received a grant in 2009, 29.9% (149) report that this was their first year receiving the grant. The majority (67.4%) of respondents report receiving a grant for under \$2,000 in 2009.

### ***Perceived Impacts of the CCCGSP:***

A series of questions asked respondents whether receiving grants from the CCCGSP changed aspects of their child care or work productivity.

Almost all (95.5%) respondents indicated that the grant helped with paying for child care. Over one-third responded that the grant increased overall satisfaction with care and 29.3% indicated that the grant increased the quality of care. Interestingly, over one-fifth responded that the program allowed Cornell parents to return to work after the birth of their child. Just over three percent reported that the grant helped them in “other” ways: 40% of these comments mentioned assistance with providing better or expanded summer experiences. Respondents indicated that the grant helped with the following child care issues (N = 584):

*Chart 4: The CCCGSP Helped with the Following Child Care Issues:*



Approximately two-thirds (65.3%) of respondents reported that the money provided by the child care grant freed up money for other family activities (N = 616). Forty-one percent of respondents reported that the grant money expanded the number of possible child care arrangements considered or accessed (45.9% indicated that the money did not help in this area) (N = 614).

Interestingly, the majority (88.2%) of grant recipients did not change their child care arrangements because they applied or received a grant from the grant program. However, one in five respondents who reported a household income of \$40,000 – \$60,000 changed their arrangement because of the grant (N=125). Overall, of the 11.8% (73) of respondents who changed arrangements, 70.4% indicated that their new arrangement was of higher quality, 69% indicated that their new arrangement was more convenient and 54.9% indicated that it was more reliable than their child’s previous arrangement.

When participants were asked to comment about the child care changes they made and why they made them, 68.57% of the comments (N = 70 comments) related to being able to afford a higher level of quality care for their child(ren) due to the grant. Over one in four (27%) comments illustrate that respondents chose more enriching summer camp experiences, 23% moved from home based care to center based care or were able to afford more hours at a quality preschool program, 13% were able to afford the Cornell Child Care Center on campus and 10% moved their child from unregulated to regulated care.

With the help of the grant, we decided to find registered daycare, instead of using an informal provider. The informal provider was not providing a safe atmosphere, so we were relieved when we could move our children to a registered provider where the atmosphere is safe, caring and enriching for our children.

Over one-half (54.8%) of the respondents did not enroll their child(ren) in summer camps, sports or other enrichment programs because of participation in the Cornell Child Care Grant Program (N = 617). Although, almost one-fifth (19.8%) did enroll their kids in summer camps, sports or other enrichment programs because of the grant. Another 25.4% responded that the question was not applicable.

Does receiving a Cornell Child Care Grant reduce work-family stress? Almost half of the respondents (49.6%) indicated the grant “somewhat decreased” their work-family stress, and over one in five (23%) responded that the grant “significantly decreased” their work-family stress. Twenty one percent responded “no change” in work-family stress (N = 617).

The grant also appeared important to employee retention. Almost seventy percent of respondents (69.3%) report that receiving a Cornell Child Care Grant positively influenced their decision to continue working at Cornell University (22.9% reported “no”, 7.8% reported “not sure”) (N = 616). Furthermore, the majority of respondents (74.2%) report that receiving a Cornell Child Care Grant has increased their dedication/loyalty to Cornell University as an employer (.5% “reduced dedication”, 25.3% “no change”). As a further indication of positive impact, 92% of respondents have recommended the program to colleagues (N = 614).

Participants were asked to explain why receiving a Cornell Child Care Grant increased their dedication/loyalty to Cornell University (N= 307 comments). Over one in five (27%) comments specifically mentioned their “sincere appreciation” and “gratefulness” for the grant program. Of the 307 written responses:

- 26% indicated that “Cornell is committed to valuing and assisting employees and their families in various life stages, as well as the difficulties working parents face.”

My spouse and I could not have anticipated - before having children - HOW MUCH it means to have our employer's full support. It's overwhelming in today's world...trying to raise a family and maintain a healthy home environment...while both parents work full-time. We feel enormously grateful for the Child Care Grant and for the overall atmosphere of immense support from Cornell. From support of breastfeeding...to encouraging parental leave when appropriate...we are SO GRATEFUL!!!!!! Thank you. This definitely increases the sense of loyalty and dedication that we feel.

- 25% indicated that “Cornell cares about its employees.”

The Child Care Grant made me feel that my employer was concerned about me and my family and they have made an investment in me. This has an impact on my dedication and loyalty to CU.

- 23% indicated that the “CCCGSP benefits Cornell by creating and retaining a productive, engaged and committed workforce.” Another 10% indicated that the grant program reduced their stress.

I feel more dedication/loyalty to an employer who actively supports me as a single parent and recognizes that I will perform better if I am less stressed about my work-family balance and arrangements. The child care grant is a wonderful thing. I am very grateful for it.

- 20% indicated that “Cornell recognizes and understands the financial stress of child care on working families.”

I appreciate the fact that Cornell supports its parents, especially women. Our day care costs are the largest household expense we have (more than the mortgage), so everything helps. Having the grant shows me that Cornell values me as a parent and has provided flexibility and funding to ensure I can continue to work.

- 12% responded that the “CCCGSP is a benefit other local employers do not offer.”

- 7% responded that the grant “allows parents to afford the best child care possible.”

This grant has allowed me to keep them in the highest quality child care I could afford. Not only that, it made my stress level go down and my feelings towards being a CU employee very positive. I am proud to be here and proud of Cornell for recognizing the issue as Ithaca offers very little high quality care at an affordable rate. Cornell helped my family and for this I am eternally grateful. Whatever I receive I am thankful and hope that in these tight budget times the program can continue. Yes, I for one think Cornell is a great place to work and I am lucky to be here!

Participants were asked, “Do you plan to continue participating in Cornell’s Child Care Grant Program?” A majority of respondents (84.2%) (517) indicated “yes” they would, 13% indicated “no”, and 2.8% indicated “no, their child(ren) aged out of the program.”

Seventy-six respondents commented on why they will not participate in the future:

- 30% state they earn too much money to qualify
- 16% report that their school age child does not need financial assistance
- 14.5% are moving
- 13% report altruistic reasons – believing that the money available should go to families who need it more than they do
- 12% will use family, older sibling or spousal care
- 6% feel the amount of money received is not worth the time/burden
- 5% state that their provider does not qualify

Over two-thirds (69.5%) of respondents manage their grant and Select Benefit child care funds using the ClaimsPlus on-line system (49.3% responded “yes, regularly” and another 20.2% responded “yes, sometimes”). For the 30.5% who do not use the online management system, here are the main reasons why:

- Just have not tried it (41.2%)
- Did not know about it (20.3%)
- Easier to file on paper (22.3%)
- No computer at home (2%)
- Other (14.2%)

Approximately two-thirds (61.5%) of participants did not add funds from their paycheck into a Select Benefits Dependent Care (FSA) account in 2009, 35.3 % did add funds. Participants report that the freedom to use any type of legal care (85.7%) is the main strength of the grant program, followed by the “ease of the application process” (63.9%). Only one in five (20.6%) indicated that “the grant amount is adequate or more than adequate for my financial needs” (N = 621).

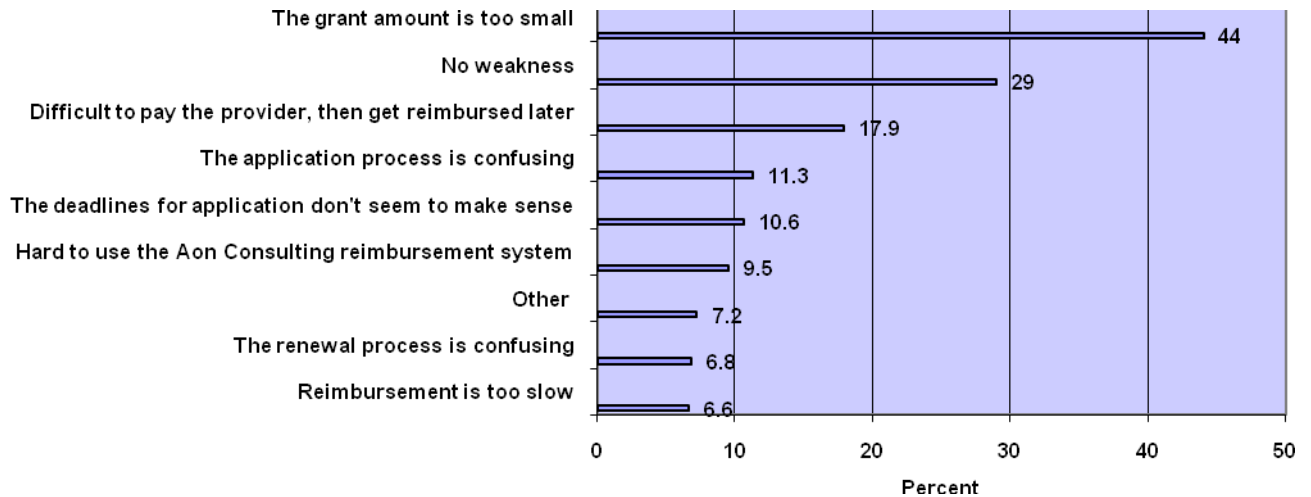
Participants were asked to provide comments on what they thought are the most important benefits of the grant program (N = 172 comments). Overwhelmingly, 52% commented that helping to ease the financial burden was the most significant benefit.

Again, respondents also discussed:

- 17% - access to quality otherwise unaffordable
- 11% - benefits to Cornell in helping to retain and create a productive, loyal and creative workforce
- 10% - flexible use of funds
- 8% - efficient program, simple process
- 6% - pre-tax benefits

Participants were asked to indicate weaknesses of the grant program (N = 621). When this survey was conducted in 2007, 72% of respondents thought that “the grant amount was too small” as compared to 44% who feel the same way in 2009. Another illuminating finding: 29% feel there are no weaknesses in the program! Almost one-quarter feel that it is difficult to pay the provider and get reimbursed weeks later.

*Chart 5: Weaknesses of the Cornell Child Care Grant Program*



***Satisfaction and Ways to Improve the Program:***

Overwhelmingly, 91.7% of respondents are “very satisfied” (34.5%) or “satisfied” (57.2%) with the program. Only 3.5% are dissatisfied. Respondents were asked to comment on ideas to improve the program. Again, a large majority of comments indicated participants were extremely grateful, appreciative and satisfied with the program, but also offered suggestions for additional improvement especially regarding deadline communications (20%), additional funding (17%), and further clarification regarding how grant money is awarded or how “the formula” is calculated (14%) (N = 184).

***Conclusion:***

- Does the Cornell Child Care Grant Subsidy Program positively impact the variety, reliability and quality of child care for employee children?
- Are most employees not only satisfied, but extremely grateful and appreciative of the grant program?
- Does the CCCGSP positively impact the productivity and engagement of Cornell’s working parents?
- Does the CCCGSP, as an integral part of a holistic work-life program, retain Cornell’s workforce?
- Is the university, as a whole, positively impacted by this grant?

... the answers are... Yes!



***Project Credits:***

We would like to acknowledge the following individuals for their guidance and leadership on this project:

*Principal Investigators:* Mildred E. Warner, Ph.D. Dept of City and Regional Planning and Lena Hipp, Ph.D. Candidate Organizational Behavior.

*Cornell Office of Workforce Diversity, Equity and Life Quality:* Lynette Chappell-Williams, Michelle Artibee, and Marie Garland Ph.D.

*Consultant and Author of Project Reports:* Karen Shellenback

*Cornell Survey Research Institute:* Yasamin Miller and Andrew Whitegiver

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