# Raising Profits and Potential: Return on Investment for Work-life Effectiveness, Diversity, Workplace Equity

2006 National Employer Summit
Conference Papers and Discussion Summary

## *Executive Summary*

Business and Professional Women's (BPW) Foundation sponsors national employer summits to bring together individuals and employers concerned with workplace equity, work-life effectiveness and diversity. BPW Foundation had three clear goals in sponsoring the 2006 National Employer Summit (NES): *Raising Profits and Potential: Return on Investment for Work-life Effectiveness, Diversity, Workplace Equity:*

- to share the latest knowledge and research on the return on investment to employers for engaging in policies and practices that enhance work-life effectiveness, workplace equity and diversity
- to discover promising practices and public policy options that better enable the adoption of such practices
- to identify areas for education, programs, policy action, or education to enhance the ability of employers and employees to build successful workplaces

The Summit's publications showcase insights from specialized research undertaken at the events that synthesize the combined knowledge of participants around critical workplace issues, promising practices, and public policy implications.

The 2006 NES Conference Papers and Discussion Summary is a collection of informative conference papers and table discussion summaries. The original speaker abstracts, which outline recent research and promising practices at the time of the Summit, are included for each discussion area and provide a thorough discussion framework.

Following each set of abstracts is a synthesis and analysis of the event's table discussions per track and topic. Included within each synthesis are relevant insights provided during the table discussions for each topic area as well as those offered during networking and other informal discussions throughout the day. The discussion notes include an overview of trends identified by participants; an analysis of common ground issues where these trends appear to intersect; highlights of priorities within the common ground areas that appear to be critical to moving the agenda forward; actionable strategies for creating change; and any comments that helped to illuminate the discussions.

Whenever possible, references to specific practices, research, or policies mentioned during discussions are footnoted in the text. Because the references were made as part of free-flowing discussions, it was not always possible to find citations for every reference captured. The reference information is provided mainly to aid readers in using the information provided in the table discussions in their own conversations or research. Any oversight in citations is not intended as a claim of ownership by BPW Foundation. Readers who spot an omission are encouraged to contact the Foundation and provide a citation. The electronic version of the summary will be periodically updated to include such revisions.

BPW Foundation staff is solely responsible for the content of the synthesis and analysis sections. Not all participant ideas or comments could be included, but we believe our efforts reflect insights from participants as shared throughout the 2006 National Employer Summit.

## Overview

The 2006 NES engaged more than 70 participants for discussions. Prior to the Summit, Business and Professional Women's (BPW) Foundation strategically identified employers, organizations, and government agencies that represent the varied stakeholder groups and industries impacted by equity, diversity, and flexible workplace practices. It also sought to ensure the sharing of a wide-range of views as well as the dissemination of the latest in research and practice. Representatives from these organizations were then invited to speak and/or attend. They ranged from employers that were early adopters of promising practices, research organizations, policymakers, government agencies, to nonprofits representing key constituencies (i.e. maturing workers, workingwomen, people with disabilities, women veterans, etc.). The Summit's design, including its invitation list and speaker selections, was strategically developed to elicit both cutting-edge thinking on key topics and to foster the development of a diverse, cross-sector network. This network includes researchers, policymakers, advocates, and employers who could drive new action around work-life effectiveness, workplace equity, and diversity.

## Discussions

Discussions held at the 2006 Summit are indicative of the ideas and practices of those on the leading edge of work design. The employers, researchers, policymakers, and individuals engaged in the Summit's educational programming and research are already thinking and acting to build successful 21st Century workplaces.

These "change agents" are not necessarily representative of most U.S. businesses. For example, while the realities of upcoming demographic shifts such as the aging of the American workforce are being discussed by researchers and industry associations, the majority of employers involved in a 2005 General Accounting Office report which looked at the aging of the workforce indicated that they had not taken steps to hire or retain older workers[1]. The early adopters of work-life effectiveness, workplace equity, and diversity initiatives present at the 2006 National Employer Summit include employers, researchers, policymakers, and government agencies seeking to address a myriad of impending changes in the workplace and labor market.

In order to provide readers with an overall sense of the direction and tenor of ideas presented during the Summit, discussion summaries were compiled from notes taken during the formal table rounds as well as informal discussions that developed during the networking and luncheon sessions. BPW Foundation believes that these conversations as well as the actionable strategies outlined in the Summit papers can drive forward proactive changes in work design that will provide win-win solutions for employers and workingwomen striving to create equitable, flexible, diverse workplaces.

### The special role of workplace flexibility

As participants addressed issues in all three topic areas (work-life effectiveness, workplace equity, diversity), one work-design tool, workplace flexibility, emerged as a favored solution for multiple challenges associated with creating equitable, diverse workplaces. Its general popularity rested on its perceived potential to reshape the workplace to the benefit of the broadest group of employees as well as employers.

While numerous additional solutions and practices to support the development of equitable, diverse workplaces were discussed, *workplace flexibility* was the most talked about tool in work design discussions. It was viewed as having great potential to reshape work structures to the benefit of a variety of industries and a multitude of workers.

Workplace Flexibility 2010 of Georgetown University Law Center, 2006 NES co-sponsor, defines workplace flexibility in the following manner:

- The ability to have flexibility in the scheduling of full-time hours (e.g., a range of flexible work arrangements, including flextime and compressed work weeks)
- The ability to have flexibility in the number of hours worked (e.g., reduced hours, such as part-time or part-year)

---

[1] "Older Workers: Labor Can Help Employers and Employees Plan Better for the Future." United States Government Accountability Office. 2005.

- The ability to have career flexibility with multiple points for entry, exit and re-entry into the workforce (e.g., extended time off and career on- and off-ramps)
- The ability to address unexpected and ongoing personal and family needs (e.g., short-term time off and episodic time off)

Rather than view workplace flexibility as an accommodation of the needs of specific groups of employees, proponents view flexibility as a tool for reshaping work options and attitudes that can empower both workers and employers. According to those active in promoting work-life effectiveness, a positive by-product of making work "work" via providing flexible work options is that they make the workplace accessible to the largest possible pool of employees. By designing work options that measure productivity versus the time spent in the workplace, it allows personnel that may have had a harder time fitting into traditional work structures to be available for employment (i.e. caregivers, impending retirees, people with disabilities, etc.)

Challenges foreseen for the establishment of workplace flexibility as a new norm relate to concerns that flexibility might become a substitute for receiving equitable wages, health and other benefits, and career advancement opportunities. The benefits of workplace flexibility[2] for employers emphasized within the Summit discussions referred to resulting increases in employee engagement and the related boosts to overall company productivity[3] rather than their efficacy as a substitute for other equitable work practices. Proponents of workplace flexibility as a work design tool are clear that the overall success of the option relies on it not being uncoupled from other measures that ensure equitable and diverse workplaces. Rather, the view expressed by many participants is that when flexibility becomes a workplace norm, it must necessarily be accompanied by proportional access to benefits and productivity-based measures of performance as a means of recruiting and retaining valued employees. They also emphasized that employer issues related to utilizing workplace flexibility options must also be addressed including concerns about wage-replacement, the challenges of supervision, and the equitable application of flexible work options across employee groups.

## Priority Strategies

Prioritizing the exciting ideas and promising practices offered during the Summit was the task of participants during their final two large-group discussions. Attendees divided into two groups—one to prioritize actionable strategies to drive the development and adoption of voluntary practices, and the second to prioritize strategies related to developing and supporting public policies and government programs.

Participants in the voluntary practice discussion identified the workplace practices about which they wanted more information or which they felt could be promoted as promising practices. Within the discussion, they also identified strategies to gather and share practices among stakeholders. Those engaged in the final policy discussion were tasked with identifying areas for public policy development or for the development of supporting research as well as to identify promising practices that could inform policy development. They were also asked to identify policy-related topics about which they desired more information.

### Top Priorities in Voluntary Practice Adoption or Education

Over the course of the next year, it is imperative that those providing research, working on, or supporting the voluntary adoption of promising workplace programs focus on two key areas:

1. Provide practical examples of solutions and user-friendly tools that employers of all sizes can use
2. Develop deliberate strategies that lead to culture-change

---

[2] Business Impacts of Flexibility: An Imperative for Expansion. Corporate Voices for Working Families. 2006. <www.cvwf.org.
[3] Levin-Epstein, Jodie. "Responsive Workplaces: The business case for employment that values fairness and families." Reprinted from the Mother Load, a special report in The American Prospect. 2007<www.clasp.org>

**Top Priorities in Public Policy Development and Education**

Over the course of the next year, it is imperative that those working on developing policy or providing research and information to support the development of work-life policy focus upon ideas to:

1. Remove barriers to work-life effectiveness options
2. Develop metrics around measuring impacts of work-life effectiveness, equity, and diversity to build the case for change and measurable impact
3. Provide incentives for flexibility

**<u>Follow-up to Summit</u>**

      In the first months following the 2006 National Employer Summit, BPW Foundation began to implement the strategies identified by Summit participants as top priorities. Through educational activities, policy outreach to U.S. Congressional Staffers, and research efforts, BPW Foundation is following-through on its commitment to Summit attendees to offer them a year's worth of robust resources. Work by the BPW Foundation and other Summit attendees is driving activities that are impacting the development of public policy, government programming, research, and voluntary practices which will help re-design workplaces for workingwomen and men. These workplaces of the present and future will be more likely to model work-life effectiveness and workplace flexibility, equity, and diversity.

**Current and Ongoing Activities Undertaken by BPW Foundation**

<u>Policy Outreach</u>

- BPW Foundation Special Policy Event

    BPW Foundation believes that through collaboration it can support the development of public policy that positively impacts the workplace as well as the lives of workingwomen and their families. Special policy events and audio conferences provide participants with the tools they need to discuss and develop public policies that help build successful workplaces and create systemic change. In February 2007, BPW Foundation sponsored a Special Policy Event titled *Building Policy Together: Workingwomen, Employers and Policymakers*.

- Policy Resource Activities

    In its capacity as a neutral convener and independent clearinghouse and research institution, BPW Foundation has a long and continuing tradition of informing policymakers at all levels on issues impacting workingwomen. After the 2006 NES, BPW Foundation:
  - Began working with its sister organization, BPW/USA, as a resource to Capitol Hill staffers working on legislation related to workplace flexibility, paid sick leave, paid family and medical leave, etc.
  - Utilized a workshop at the Special Policy Event as a focus group for a Hill Staffer, allowing workingwomen and small business owners a chance to provide input on key aspects of the draft legislation
  - Engaged NES participants as well as other employer, workingwomen, and research connections in policy development discussions with Hill staffers to ensure that they were able to hear from key stakeholders
  - Participated in an Equal Employment Opportunity Commission-sponsored focus group on issues impacting workingwomen

Media Outreach & Publicity

BPW Foundation has strategically expanded outreach for its messaging and research by participating in strategically chosen conferences, seminars, and focus groups that support the development of research, practice and public policy around workplace equity, diversity, and work-life effectiveness. But BPW Foundation is not limiting its outreach to research and policy circles. BPW Foundation is committed to contributing to the public dialogue as well and is developing an outreach strategy that includes contributing to and developing articles and opinion pieces for mainstream media outlets.

Expansion of the Cross-Sector Network

- Partner Engagement

  o Two speakers from the 2006 NES were elected to BPW Foundation's Board of Trustees in early 2007. Lisa Hershman, Global Vice President of Operational Excellence and Quality and first Chairwoman of Avnet, Inc.'s Global Women's Forum and Muriel Watkins, Vice President of Human Resources of The New York Times represent major employers with strong work-life and diversity initiatives.
  o A Department of Labor-Women's Bureau representative reported to BPW in early 2007 that a new collaboration was recently created between the DOL-WB and the DOL-Office of Disability Employment Policy as a result of conversations begun during the 2006 NES.  The two agencies will collaborate on workplace flexibility outreach and education.

**Upcoming Activities from BPW Foundation**

Educational Outreach

- Webinars/Audio Events Series

BPW Foundation, in conjunction with various program collaborators, offers a series of audio and web conferences on critical workplace issues. Upcoming topics include *Flexibility: Management's Perspective, Work Design: Flexibility Versus Face Time, Supporting Women Veterans, Building Public Policy Together: Consensus-Based Policy Creation, Workplace Flexibility: Developing a Strategic Plan for Public Policy Development.* In addition to publicly available webinars, members of BPW Foundation's employer advisory network, which includes past Summit participants, will have access to special webinars focused on peer-to-peer knowledge sharing around topics raised during the Summit. Recordings and resources from prior calls are available at www.bpwfoundation.org.

- Women's Network Knowledge Sharing Series and Online Tutorial

As part of its commitment to promote the dissemination and adoption of promising voluntary workplace practices identified during the Summit, Business and Professional Women's Foundation is developing a Women's Networks Series. The Women's Networks Series integrates online learning, peer-to-peer knowledge sharing, articles, and web-based events to increase the level of knowledge about how to create women's networks within the workplace and what they can and can't do to increase women's career mobility and to foster equity and diversity. The project will be launched with a panel discussion on women's networks to be held in Reno, Nevada on July 19, 2007 as part of BPW Foundation's *Women's Advancement Luncheon and Seminar*. The luncheon and seminar take place during the 2007 BPW/USA National Conference. For more information, visit www.bpwusa.org/nationalconference.

- Expansion of Rawalt Online Resource Center

Over the next three years, BPW Foundation will continue to convert its extensive physical archive, the *Marguerite Rawalt Resource Center* (Rawalt), into an easy-to-access online resource center. In response to requests by Summit participants for a comprehensive database that captures the latest in effective practices and information on policy development in one place, BPW Foundation will emphasize the collection of materials and links on work-life, diversity, and equity over the next year of the online resource center's expansion. Materials from participating 2006 NES organizations and employers will be highlighted along with those from additional university centers, national and international government websites, and innovative employers. But, Rawalt will not simply be a passive repository; through the Rawalt project, the knowledge contained within in it will be disseminated via e-newsletters, articles, op-eds, webinars, and online tutorials to mainstream publications, employers, researchers, workingwomen advocates and policymakers. To visit the resource center, visit www.bpwfoundation.org.

- Quarterly Newsletter on Policy & Practice

In Summer 2007, BPW Foundation is launching a quarterly e-newsletter for employers, workingwomen, researchers, and policymakers that will feature articles and bibliographies on voluntary practice and public policy areas identified at the 2006 National Employer Summit.

- 2008 National Employer Summit

To answer the demand for safe places for employers, policymakers, researchers, and advocates to meet and share promising practices and public policy insights, BPW Foundation will host a 2008 National Employer Summit. BPW Foundation's 2008 National Employer Summit, to be held Summer 2008, will showcase research, voluntary practices, and information on public policy or government programs that helps employers build workplaces that model workplace flexibility, workplace equity, and diversity. Champions among employers, researchers, government officials, and policymakers will be highlighted as they present the latest research or promising practices that impact workplaces. Summit seminars will also examine the laws and regulations that impact employers in these areas and illuminate the rights and responsibilities employers and employees have under them. Opportunities for professional development, networking, and small-group discussions will be featured throughout the event. For more information on how to participate in the 2008 NES, e-mail foundation@bpwfoundation.org.

Expansion of the Cross-Sector Network

- Employer Advisory Network

In 2005, BPW Foundation established the nucleus of a new cross-sector network of employers, workingwomen, researchers, and government agencies. The network's purpose is to identify and implement the systemic changes needed to fully empower workingwomen and to advise, promote, and participate in BPW Foundation programming and research activities. To date, over 60 organizations have shared their knowledge and resources to support BPW Foundation's research, education, and professional development events. In 2007, BPW Foundation will formalize relationships with a number of its employer advisory network members to engage in collaborative research and educational projects on topic areas arising from the 2006 NES.

**Using the NES Conference Summary**

This conference summary includes most of the original resources provided to Summit participants as well as a summary of participant discussions. Using these tools should offer those who were not able to participate in person a flavor of the day's insights and revelations.

BPW encourages readers to use the summary as a starting point for discussions within their own organizations, as a source of information to locate more research on this topic, and as a guide to prioritizing their own policy or voluntary practice activities.

## *Overview of Day*

*2006 National Employer Summit:*
*Raising Profits and Potential: Return on Investment*
*for Work-Life Effectiveness, Diversity and Workplace Equity*
L'Enfant Plaza Hotel
Washington, DC
November 9, 2006

**<u>Agenda</u>**

8:30-9 a.m. Informal Networking & Buffet Breakfast
9-10 a.m.
Leadership Breakfast
- Welcome— Dr. Sheila Barry-Oliver, Board of Trustees Chair, BPW Foundation
- Leadership Speaker Introductions— Lisa Hershman, Global Vice-President of Operational Excellence and Quality and first Chairwoman of Avnet's Global Executive Women's Forum
- Raising Profits and Employee Potential
- Voluntary Practice Perspective—Muriel Watkins, Vice President of Human Resources, The New York Times
- Public Policy Perspective—Toni-Michelle Travis, Associate Professor, George Mason University
- Opening of Program—Katie Corrigan, Co-Director, Workplace Flexibility 2010 of Georgetown University Law Center

10:15 to 11:15 a.m. Networking and Sharing of Promising Practices
11:25 to 12:15 p.m. First Round of Table Discussions
       (Participants selected one of three topic areas and spent 50 minutes on voluntary practices or policy in that topic area)
12:15 to 1:15 p.m.—Lunch
- CEO Welcome—Deborah L. Frett, CEO of BPW Foundation & BPW/USA
- Sharing A Promising Practice— Lisa Hershman

1:30 to 2:20 p.m. Second Round of Table Discussions
2:30 to 3:20 p.m. Third Round of Table Discussions
3:20 to 3:40 p.m. Break
3:45 to 4:25 p.m. Participants divided into two streams of action to identify and prioritize actionable strategies.
- Voluntary Practices
- Public Policy

4:25-4:45 p.m. Report from Groups and Summary
4:45 to 5:30 p.m. Closing Networking Reception…card exchange

*Event sponsors:*
***Business & Professional Women's Foundation***
***Workplace Flexibility 2010 of Georgetown University Law Center***
***Avnet, Inc.***

**Overview of Education and Research Methodology for 2006 National Employer Summit**

Prior to the 2006 Summit, Business and Professional Women's (BPW) Foundation strategically identified employers, organizations, and government agencies representative of the varied stakeholder groups and industries impacted by the issues of workplace equity, diversity, and flexibility. Recognizing that the inclusion of a representative cross-section of stakeholder groups would ensure the sharing of a wide-range of views as well as the dissemination of the latest in research and practice, BPW Foundation then sent out invitations to speak or attend. Stakeholder groups invited ranged from employers that were early adopters of promising practices, to research organizations, policymakers, and government agencies which focused on the Summit's chosen topics, to organizations representing key constituencies (i.e. maturing workers, workingwomen, people with disabilities, women veterans, etc.). The Summit's design, including its size, discussion format, invitation list and speaker selections, was crafted to elicit both cutting-edge thinking on key topics and to foster the development of a collaborative network. This cross-sector network consists of researchers, policymakers, advocates, and employers who can drive new action around work-life effectiveness, workplace equity, and diversity.

**The structure of the day**

In preparation for the Summit, speakers submitted abstracts on their topic areas which were distributed in reading packets to the participants. These abstracts set the stage for the discussions to take place on November 9, 2006. A bibliography featuring citations for recent articles and research on work-life effectiveness, diversity, and workplace equity was also provided. This served as a useful tool to support further reading and to highlight works from NES speakers and participating groups. An updated version of that bibliography, including new articles and information identified since the 2006 Summit, is included in this report.

The learning and research program for the Summit was based on a modified "world café model." In a world café model program[4], participants engage in small group discussions exploring a single question or issue. Similar discussions occur simultaneously at surrounding tables. Discussion members then carry key ideas and insights from one discussion into subsequent ones. The leaders for each small group also ensure that themes and ideas from prior discussions are incorporated into new conversations.

During the 2006 National Employer Summit, three successive 50-minute discussion segments were scheduled. Each track—work-life effectiveness, diversity, work-place equity—included two small group discussions for each segment. Within every segment, each track explored both the voluntary practice and public policy aspect of its given topic. Thus a total of eighteen small group discussions were held during the Summit. The same speakers and tracks were offered during each of the successive discussion times. To capture the ideas and insights provided by participants, note takers were assigned to each table.

When table discussions began, participants had two choices to make: 1) what track they wanted to learn more about (work-life effectiveness, diversity, work-place equity) and 2) what sub-topic of that track they wanted to discuss (voluntary practices of employers or public policy/government opportunities & implications). Therefore, participants participated in three table discussions by the end of the day.

In order to maintain the small-group dynamic of the programming, facilitators were instructed to keep the numbers evenly dispersed at each table throughout the day. To enable a broader range of knowledge sharing and the dispersion of ideas, networking opportunities were programmed into breakfast, lunch, and an afternoon reception.

**Developing an action plan**

After the small group discussions were completed, participants were split into two tracks (voluntary practices and public policy) and asked to identify the priority issues, policy areas, or examples of promising practices that they wanted to learn more about or engage in over the coming year. Actionable strategies for both voluntary practice and public policy were then identified as being high priorities for action or education over the next year and beyond. Throughout the following year, BPW Foundation was to implement or to support the implementation of the strategies or ideas presented, sponsor in-person or virtual educational opportunities, or develop resources on these strategies or practices.

---

[4] The World Café. <http://www.theworldcafe.com/>

## *Opening Discussion Summary*[5]

At the 2006 National Employer Summit: *Raising Profits and Potential: Return on Investment for Work-life Effectiveness, Diversity, Workplace Equity*, attendees represented four groups: researchers, policymakers, workingwomen, and employers. The Summit highlighted key themes of workplace equity, work-life effectiveness, and diversity. Prior to breaking into small groups, a leadership breakfast was held to provide participants with an overview of promising practices and public policy areas that might impact work-life effectiveness, workplace equity, and diversity.

The leadership breakfast was moderated by Lisa Hershman, Global Vice-President of Operational Excellence and Quality of Avnet, Inc., and featured Muriel Watkins, Vice President of Human Resources for The New York Times, and Dr. Toni-Michelle Travis, political analyst and associate professor at George Mason University. The leadership breakfast provided insights and examples on the two predominant schools of thought on the implementation of workplace change: 1) the dissemination and adoption of voluntary workplace practices and 2) the development of public policies. Watkins provided hands-on examples of promising voluntary company practices from The New York Times, and Travis offered an overview of what participants could expect from the (then) new Congress, a group with the power to create legislation affecting thousands of employers and millions of employees.

Watkins shared significant elements of The Times' diversity initiative. She admonished the audience to "champion" diversity and noted that her company deliberately changed their internal language to reflect their emphasis on the active work of championing diversity rather than the more passive assertion to simply embrace diversity. She also shared what The Times refers to as its burning platform—those factors that make a diverse workforce critical. The platform includes shifting demographics; a multi-generational workforce, competition for talent; labor shortages; and globalization. The factors also mirror those identified by BPW Foundation prior to its 2005 Summit as forces shaping workforces and workplaces[6].

In terms of work-life policies, the Times has an informal, voluntary policy which complements their overall diversity strategy. Guidelines are set by management, who then provide opportunities for discussions. "We do not require, nor do we wish to know, the reason for the request…all have merit, and we don't feel we should judge the importance," stated Watkins.

Travis then addressed the question of what might workingwomen and employers expect from the new Congress, especially how its members might deal with the issues to be discussed during the Summit: work-life effectiveness, workplace equity, and diversity. Many of her forecasts have borne fruit since the 2006 Summit.

First, she gave an overview of policy creation and the importance of committees at the federal level. "The Speaker of the House shapes the legislative agenda…. We should also expect increased activity with special interest groups representing labor, AARP, and women," she said.

Travis further outlined an abrupt shift in social issues and values including: increased scrutiny of defense, military, and government contracting; attention to minimum wage and education and a shift in the "business friendly" quotient of committee chairs. After the 2006 Summit, minimum wage, wage equity, and education received greater attention on the Hill with hearings held relating to issues explored during the Summit (i.e. equity) as well as legislation under development. Minimum wage and education issues received major attention as part of the "The First 100 Days" priorities set by the new Democrat-led Congress.

Although, in general, many of the forecasts made by Travis related to more attention being paid to issues impacting women, diversity and equality, she cautioned that a possible outcome for the new Congress might be increased deadlock between the House and Senate.

After hearing from the breakfast speakers and while still in the large group setting, participants were invited to share information about their organizations. This exercise provided BPW Foundation with a cross section of the priorities of what the four different groups—researchers, policymakers, workingwomen, and employers—wanted to achieve during the Summit.

---

[5] "*Raising Profits and Potential*." BusinessWomen (BW) Magazine. Winter 2007. Summaries of the opening discussion can also be found in the Winter 2007 edition of BW Magazine. <www.bpwusa.org>

[6] Resources and Policy Changes Needed to Create Successful Workplaces. BPW Foundation. April 2006. <http://www.bpwusa.org/i4a/pages/index.cfm?pageid=4944>

"We have to provide venues for discussion between various groups," explained a BPW Foundation representative. "They all play an important role in helping identify those common ground areas ripe for action."

A brief sample of comments from participants follows:

A representative from the *U.S. Department of Labor* remarked that she was "here to speak and share." She informed the other participants of the Department's resources such as data on the needs of employees of different generations and phases of employment.

*The Choose 2 Lead Foundation*, which also participated in BPW Foundation sponsored workshops at the 2006 BPW/USA National Conference, was interested in learning more about how to retain highly skilled women. This topic was also addressed at *Workplaces and Workforces in Transition*, the 2005 Summit, and disseminated in a final report to researchers, policymakers, and the media.

*Worklife Performance* wanted to know, what are the challenges voiced by employers? "That's why I'm here. … It has to make sense for the bottom line." This concern is common in the business community and is one that BPW Foundation repeatedly hears; hence the theme for the 2006 Summit.

*Corporate Voices for Working Families* came to share new research on the impact of work-life flexibility policies on lower-wage workers and the benefits of workplace flexibility for employers. Representatives served as table hosts for the work-life flexibility discussion.

*Discovery Communications, Inc.* sought information on how to build a business case for work-life policies and to learn how to establish trainings for management across the organization.

*YMCA- Orange County was* already employing informal flexibility policies and wanted to learn from about formal and for-profit models. YMCA has an "in-and-out" policy that has helped cultivate creativity among employees and provides a break in the day, said a YMCA representative. Examples included leaving mid-afternoon for school pick up or school meetings during the day. Although nonprofit cultures can be different from their for-profit counterparts, work-life issues still impact work and productivity, it was explained.

*National Council on Independent Living* is an organization that works on behalf of people with disabilities and came to learn what policies and practices might better engage those with disabilities in the workplace.

*The New York Times* representatives explained that their employer leads by doing; management tasks a staff person to lead work-life policy and flexibility initiatives in order to jump start the inclusion of work-life in the corporate culture. As one of the event's opening speakers, Watkins, shared The New York Times' "Rules for the Road" for developing diverse, flexible workplaces.

After the large group discussion, participants then moved into the table or small group discussion phase of the Summit.



Muriel Watkins, Vice President of Human Resources for The New York Times, shared promising practices for diversity initiatives during the morning Leadership Breakfast. Ms. Watkins joined the BPW Foundation board in March 2007.

**The New York Times' Rules of the Road[7]**
"Achieving financial and journalistic success at The New York Times requires that we take personal responsibility for closely adhering to the following tenets of behavior: • Be stewards of our Company's brand reputation and assets • Treat each other with honesty, respect, and civility • Uphold the highest journalistic, business, and personal ethics • Keep a relentless focus on serving our customers • Innovate to reach our full competitive potential • Execute with urgency, agility, and excellence • Champion diversity • Collaborate to harness our collective strengths • Achieve results by challenging yourself and mentoring others • Maintain perspective and a sense of humor"

---

[7] "The New York Times Company Journalism Ethics Policy." 2005. <http://www.nytco.com/company-journalism-ethics.html#standards>

## *Small Group Discussion Summaries*

The learning and research program for the Summit was based on a modified "world café model." In a world café model program, participants engage in small group discussions exploring a single question or issue[8]. Similar discussions occur simultaneously at surrounding tables. Discussion members then carry key ideas and insights from one discussion into subsequent ones. The leaders also ensure that themes and ideas from prior discussions are incorporated into new conversations. A list of Summit speakers for each specific topic area is provided on the opening page of each discussion area's summary section, and a full list of speakers is included in the Speaker Information section at the end of the Summit report.

During the 2006 National Employer Summit, three successive 50-minute discussion segments were scheduled. Each track—work-life effectiveness, diversity, work-place equity—included two small group discussions for each segment. Within every segment, each track explored both the voluntary practice and public policy aspect of its given topic. Thus a total of eighteen small group discussions were held during the Summit. The same speakers and tracks were offered during each of the successive discussion times. To capture the ideas and insights provided by participants, note takers were assigned to each table. The discussion summaries that follow rely heavily on the notes taken at each table as well as on notes and observations made during informal discussions held through-out the day.

Discussion summaries are presented in the following order:

**Work-life Effectiveness**
  Practice
   -Abstracts
   -Discussion Summary
  Policy
   -Abstracts
   -Discussion Summary

**Diversity**
  Practice
   -Abstracts
   -Discussion Summary
  Policy
   -Abstracts
   -Discussion Summary

**Workplace Equity**
  Practice
   -Abstracts
   -Discussion Summary
  Policy
   -Abstracts
   -Discussion Summary

---

[8] The World Café. <http://www.theworldcafe.com/>

## *Work-Life Effectiveness <u>Practice</u> Discussion*

Discussion Topic: Raising employer profits and employee potential…what is the true impact of work-life effectiveness?

### *Speakers:*

- Jodi Levin-Epstein, Deputy Director, Center for Law and Social Policy
- Nina Madoo, Director of Workplace Strategies, Diversity & Workplace Effectiveness, Marriott International, Inc. (2006 FORTUNE 500 Company)
- John Wilcox, Deputy Director, Corporate Voices for Working Families

Following the abstracts is the synthesized version of the discussion based on notes taken during the three table discussions on this topic as well as insights offered during informal discussions throughout the day. The summaries may or may not reflect the views of all of those who participated.

## ABSTRACTS

## ABSTRACT A

Marriot International, Inc.
*"Talking Success – Living our Core Values" Marriott's Hourly Engagement Initiative*
Prepared by: Nina Madoo, Director of Workplace Strategies, Diversity and Workplace Effectiveness, Marriott International

**Promising Practice Overview**

Marriott International, Inc. is a leading worldwide hospitality company. This initiative addresses the levers that drive associate engagement at work so they are motivated to go above and beyond to ensure Marriott succeeds—thereby ensuring their own success.

**What challenges does the promising practice address?**
Engagement is linked to improved associate and customer satisfaction, brand loyalty, and higher profit margins. We know that if we can improve the engagement of our associates, we will have a significant ROI for our company.

**What does your promising practice offer (i.e. benefits, free services, etc.)?**
We have four main themes of engagement and each offers different benefits, training or services. They are as follows:

- **Leadership Excellence** – New training class for managers (Engaging Hearts and Minds) and new GM Chat Session model rolled out. Two core classes revisited; mandated classes but realization that refreshers and more frequent delivery needed (supervisor training and Positive Associate Relations).
- **Personal Growth** – Personal financial training, English-as-a-second-language focus, and pilot program. Re-focus on internal promotion process.
- **Quality of Life at Work** – Increased awareness, communication, and education on our resource and referral program, myARL. Highlighting associate success stories and growing our peer review process.
- **Pride of Affiliation with a Great Company** – Focused on promoting and increasing the visibility of current benefits. Sharing our awards and company recognitions and celebrating the success of our associates.

**What do you feel were your three biggest challenges in implementing the promising practice?**
- Rolling out the initiative across our vast distribution and diverse population
- Implementing the initiative in a short timeframe
- Securing support from field operations when there are many competing priorities

**What are three positives for your employees related to implementing the promising practice?**
- A new diagnostic tool that helps property managers understand how to put together an action plan through an assessment of their strengths and opportunities around associate engagement
- A new "rap session" module with General Manager, giving associates the opportunity to be heard and to provide suggestions on improving their quality of life at work
- Improved communications campaign on existing but underutilized benefits (example: profit sharing) and newly developed programs such as financial literacy training and language literacy programs (example: Sed de Saber)

**What changes has your organization undergone related to implementing the promising practice? For example, has your practice positively affected the day-to-day business culture of your organization? Does it have an impact on retention?**

- The practice will change associates' engagement and ultimately their associate experience at work. It is our goal to engage their "hearts and minds" to bring them to a higher level of engagement and enhance their experience at Marriott from like to love! We have changed the associate experience by implementing "daily stand up meetings" about benefits, training, and growth opportunities. Daily basic wallet cards were created along with posters and brochures to help reinforce messages about personal growth and quality of life at work.
- Engagement has clearly been the burning platform for 2005 & 2006. All properties have mandated a roll out of the "Living our Core Values" program which includes the General Manager chats, daily stand up meetings, and the "Engaging the Hearts and Minds of Associates" training program which educates managers on the key themes of engagement: leadership excellence, personal growth, quality of life at work, and pride in company.
- As a result of the engagement strategy, flexibility has re-emerged as a critical lever to engaging associates. We have a pilot in our hotels right now testing a flexible scheduling model with hourly associates. We have also added a module to our key leadership development program addressing creative and innovative ways to attract and retain talent in light of changing demographics and other dynamics affecting today's workforce.

**Explain how you know it is successful. Provide three ways that potentially measure the success of these solutions:**

- We have seen increased utilization of core programs. Resource and Referral saw a 5-10% increase in utilization once the program was rolled out. Profit Sharing increased participation rates by market.
- We have a diagnostic tool that provides an evaluation of the physical work environment, culture, associate relations and other factors within a specific location. This can be used to help employers develop an action plan by identifying the key strengths and opportunities for improvement within their work environment.
- Anecdotes have been extremely positive and the program is very well received. Managers embraced the program enthusiastically, but also challenged us to think about their engagement. As a result, we are actively working on our management engagement strategy. We are currently finishing up our Associate Opinion Surveys, which also have an engagement index component. We will soon have a better understanding of whether this initiative had an impact on company wide engagement measures and associate satisfaction.

## *ABSTRACT B*

Corporate Voices for Working Families
*"Business Impacts of Flexibility - An Imperative for Expansion"*
Please Reference: http://www.cvworkingfamilies.org/downloads/Business Impacts of Flexibility.pdf

## *ABSTRACT C*

Workplace Flexibility 2010
Center on Aging & Work/Workplace Flexibility
*"Legal and Research Summary Sheet: Phased Retirement"*
Please Reference: http://agingandwork.bc.edu/documents/Center_on_AgingandWork_Phased_Retirement.pdf

## *Discussion Synthesis: Work-Life Effectiveness <u>Practice</u>*

<u>Trends</u>

Making work "work" is a growing concept in the field of work-life effectiveness[9]. This concept encompasses the idea that work should be rewarding for both employers and employees. Proponents of this approach observe that work can be structured to achieve the employers' bottom-line goals for productivity and creativity as well as the greatest level of engagement by employees. Redesigning work achieves these outcomes by promoting work options that respect and support employees' work-life interconnections. This is done by offering flexible work options, providing health and wellness benefits, or supporting care giving responsibilities, for example. Flexible workplaces then often measure worker productivity rather than actual time spent in the workplace (a.k.a face-time). Work designed in this way provides employees with a greater sense of autonomy, which has been linked to higher engagement and which has been subsequently linked to higher levels of customer service and productivity[10]. It also provides employers with alternative methods of dealing with cost factors such as real estate or transportation[11]. For example, some government and for-profit models of telecommuting show that employers can reduce real estate costs and experience minimal or no disruption in productivity by the effective use of telework options[12].

Making work "work" means effectively and strategically intermingling life with work—such as when employers schedule flu shot clinics during work hours and eliminate the need for employees to take time off for doctor visits. Other employers may help open up community options for employees by using their influence on the local economy to persuade community medical providers to stay open later to accommodate the needs of shift workers.

As proponents of work-life effectiveness address the need to redesign work, the tool most often sited is workplace flexibility. Rather than view workplace flexibility as an accommodation to the needs of specific subsets of employees, proponents view it as a tool for reshaping work options and attitudes that can empower both workers and employers. An additional positive by-product of making work, "work," say those active in promoting work-life effectiveness, is that it makes the workplace accessible to the largest possible pool of employees. By designing work options that measure productivity by results instead of face-time, it allows workers that may have had a harder time fitting into traditional work structures to be available for employment (i.e. caregivers, impending retirees, people with disabilities, etc.) For example, Home Depot and CVS have designed work schedules that take advantage of the availability of a specific group of employees: "snow birds," older workers who migrate between geographic regions to take advantage of warmer climates at different times of the year[13]. The do-it-yourself store chain offers flexible, part-time schedules that are particularly attractive to retirees and includes the option for regular employees to have temporary transfers.

There is experimentation going on within employers around work design options related to work-life effectiveness. Early models for flexibility, which included job-sharing or compressed work weeks, were found to be too rigid to effectively address the challenges of today's more fluid work and life realities. An emerging trend, observed through such programs as the Business Opportunities for Leadership Diversity (BOLD)[14] Initiative, is to talk about flexibility in the context of designing work in combination with managers and workers. The BOLD Initiative favors a team-based approach to designing flexible work options that involves work teams designing their

---

[9] <u>When Work Works.</u> Families and Work Institute. 2007. <http:familiesandwork.org/site/research/reports/3wbooklet.pdf>
[10] Gibbons, John. "Employee Engagement: A Review of Current Research and Its Implications." Conference Board. 2007. www.conference-board.com; also see Bond, James T., Ellen Galinsky. "How can Employers Increase the Productivity and Retention of Entry-Level, Hourly Employees." Families and Work Institute. 2006. <http://familiesandwork.org/site/research/reports/brief2.pdf>
[11] TelecommuterHire Savings Calculator. www.tjobs.com/hiresave.swf; and also see: 2006 Flex In the City Campaign. City of Houston. 2007. < http://www.houstontx.gov/flexworks/flexinthecity/index.html>
[12] "The Alternative Workplace: Changing Where and How People Work." Harvard Business Review. Reprint 98301. 1998. <http://harvardbusinessonline.hbsp.harvard.edu>
[13] Cornell, Christopher. "Follow the Flock." 2006. Human Resource Executive Online. <www.hreonline.com/HRE/storyid=6367339>
[14] <u>BOLD Initiative.</u> < http://www.sloan.org/report/2004/workplace.shtml>

own work schedule in coordination with supervisors. This method takes into account both individual and group needs for flexibility—allowing everyone some access to flexible options—while simultaneously addressing concerns about productivity and control.

Proponents of greater workplace flexibility are struggling with adapting workplace flexibility so that it can meet the demands, structures, and schedules of different types of workplaces and industries, i.e. retail or service industries versus white collar, office work. Examples within shift-based industries of employers, such as those at JCPenney and JetBlue, provide workers with access to online tools that allow them to set or swap schedules in conjunction with others in their work group under the oversight of supervisors[15]. According to some Summit participants, it is important that both salaried and hourly workers feel that their needs for flexibility are being met. For example, some service industry employers who offer flexibility find ways to offer even employees with customer-service responsibilities ways to take a few hours off as needed. Some employers have developed advanced time-tracking software that allows employees to track times in and out versus daily start and end times[16].

How to effectively harness technology to redesign work options is a question stemming from an outgrowth of 21st Century technological advances. Like a genie let out of the bottle, technology has redesigned work options in positive, negative, and completely unexpected ways. Now, employers and employees are trying to use technology in more deliberate ways to reshape the workplace to their specific or sometimes mutual benefit. While, technology has brought improvements in productivity (i.e. the personal computer) there is also a less positive flipside to be addressed: products of technology such as cell phones and Blackberries ™ can create a work-life imbalances for employees when they become available "virtually" 24/7.

Work-life is not just a discussion happening within a small group of change agents—although actual change may be happening only on a limited scale. While only a relatively contained portion of employers offers formal work-life programming, there is an expanding public dialogue on how work and life interconnect and quite often collide for many employees and their employers. Different segments of the workforce also have varying expectations for work-life interactions, for example, younger, entry-level employees are demanding that flex-time be more inclusive and less selective to allow people to take time off for training or school and not only for family issues.

Innovation in work design is occurring in all segments of the market—small, medium and large employers are experimenting with how to make work "work". The incidence of formal and informal flexibility policies can differ based on the size of employer. Capturing information on how effective these programs and policies are for employers and employees is not easy, and ensuring that the information bubbles up to reach other employers is one of the greatest challenges faced by those wanting to promote more effective work design options.

**Common Ground**

Workplace flexibility is the most talked about tool in work design discussions. It is viewed as having the potential to reshape work structures to the benefit of a variety of industries and a myriad of workers[17]. "Selling" flexibility as a way to make their workplace more competitive than the non-flexible organization is a challenge faced by change agents. The desire is to create work environments that foster loyalty and meet productivity requirements is important to many employers. But it can't be forgotten that for some employers, the costs of hiring and training new staff is not considered prohibitive. To that end, work-life effectiveness and workplace flexibility options are also being touted as a means to open up the workplace and advancement opportunities to an expanding pool of current and potential employees.

Employers and employees interested in flexibility are turning away from rigid definitions of flexible options such as part-time schedules or job sharing. Instead, they are striving to create work-life program options that are more organic and that are developed collaboratively between management and employees to meets mutual goals. Explained one participant, the family-friendly policy approach is not getting employers where they want to be … so they are focusing on work design that instead allows flexibility to be created in cooperation with managers and workers.

[15] Workplace Flexibility for Lower Wage Workers. Corporate Voices for Working Families. 2006. <www.cvwf.org>
[16] Ibid
[17] Gehl, Elisabeth. "Workplace Flexibility: What It Is and How To Get It." BusinessWoman Magazine. 2007. <www.businesswomanmagazine.org>

Leading-edge employers are modifying their work design based on the understanding that there can be an effective way to meet individual needs for flexibility while still supporting group work and collaboration. It is crucial to be able to design work options where everyone can have some access to flexibility. The freedom to take risks and experiment appears to be a critical factor in the work design movement. Programs mentioned by Summit participants were aimed at meeting the needs and changing the workplace culture among various groups of employees. Other programs were targeted specifically at changing the work culture among managers or expanding the input of line workers into their schedules. Management-targeted programs give managers more autonomy in arranging their schedules and focused on producing results versus logging in face-time. For hourly workers, experiments focus on scheduling occasional time off within fixed hourly schedules. Stress faced by hourly workers often comes from not knowing if they can take time off when needed. Employers have explored different software for time reporting systems to make it easier for employees to take off small chunks of time.

Proponents of flexible work options are also seeking scalability of solutions and technology. Small, medium, and large-size employers may all view flexible workplaces as an incentive to keep qualified workers, but the formalization of policies varies. This can mean that the perceived benefits of offering such programs may vary greatly among employers. While large employers may be more savvy at using flexible programming as a way to promote themselves as an employer of choice to recruit and retain qualified employees, small employers are often less likely to promote their own informal practices and thus reap the true recruitment benefit.

Technology, including its benefits and detriments, appears to be among the strongest elements affecting the workforce and employers in all industries. Understanding, addressing, and utilizing technology in the realm of work-life is a shared goal among employers, employees, and advocates.

## Actionable Strategies

Actionable strategies in the topic area of practical work-life effectiveness leaned towards a desire to share and explore real-life practices and programs with other Summit participants and the greater public. The second strategy lay in encouraging the types of experimentation being undertaken by employers in various industries. These organizations are developing innovative programs that appear to have greater adaptability across industries and that are more scalable across employer size.

Harnessing technology to drive useful workplace change appears to be a critical factor in the success or failure of such programs. For example, new tracking software is allowing some managers to track hourly employees time-in and time-out rather than start and end times; this allows hourly workers to have "chunks of time off" within the work day or occasional flexibility for doctor appointments rather than having to take a whole day off from work. European software tracking systems allow employees to trade hourly time by tracking and keeping points. Employees can put in preferences for shifts. The software allows people who work overtime and need time off to trade with the employee with the lowest points[18]. Other software options allow teams of employees to self-schedule using online scheduling software to cover open shifts. Some companies utilized online bulletin boards that offer a less formal scheduling where employees can swap shifts operated independently of supervisors, although they can step in if necessary. This appears to work best for employees that have the same job descriptions.

The inflexibility of early flexibility options—such as creating set options for part-time, compressed work weeks, or leave, etc. — works at some employers. Others, however, have found them too inflexible to meet the evolving needs of a workforce and workplace running on a global, 24/7 timetable. As a consequence, companies that were on the leading edge of flexibility ten years ago are now struggling to maintain momentum for the practice.

In new models, managers still have overall control of scheduling, but the new models don't require them to have control over a daily or weekly schedule. Instead, a focus is on expanding and exploring the implementation of different work-design programs. This process allows managers and employees to collaborate on developing a work environment and schedule that allows everyone some flexibility while still meeting the employer's productivity goals. One model, being developed under the BOLD Initiative, includes testing and adapting a team-designed work plan that includes flexible schedules[19]. It also takes the onus off managers in having to decide what reasons for

---

[18] TimeCare: Workforce Planning. <www.timecare.com> ; Also see, Workplace Flexibility for Lower Wage Workers. Corporate Voices for Working Families. 2006. <www.cvwf.org>
[19] BOLD Initiative. < http://www.sloan.org/report/2004/workplace.shtml>

flexible work alternatives are worthy of flex-options and addresses how to get work done versus accommodating personalized requests for flexibility.

Strategies such as this focus upon finding new ways of measuring productivity that go beyond documenting the amount of time spent in the workplace Examples of such strategies include the following:

- In the United Kingdom, some McDonald's franchises are pilot testing a program that allows family members working at the same store to decide who comes in for a given shift. This allows individual family members flexibility in determining the balance between work and family responsibilities but ensures that managers have hours covered[20].
- In Sweden, a point-system for shift work was piloted with nurses. Nurses could self-roster (book or swap) their schedules online. Different shifts were allotted different points with less desirable shifts earning more points. Managers would monitor holes in the schedule and go to the person with the least amount of points first to book the shift[21].
- Online bulletin boards or scheduling systems are a popular option for a number of shift-based jobs including airlines (JetBlue), retail (JCPenney), or phone retailing. Because of the low-cost of entry into this type of system and the ability of managers to easily monitor schedules, this type of system is seen as being quite scalable—useful to small, medium or large employers[22]. However, the system seems to work best when all employees within a department or division using the system have the same job description.
- Cross-training is one way that companies are trying to lessen the impact when employees take time off. Some big companies develop a team of people that spend time learning everyone else's jobs. This group of employees then becomes a backup team. However, in some instances pooled or centralized workers, such as an experimental program conducted in east coast hospitals, staffers felt isolated from doctors and nurses. Prior to the centralization project, people at the staff level were achieving an in depth knowledge of a specific area, whereas when they were pooled, they had to learn a little bit about everything, which they disliked and therefore it lowered employee satisfaction and engagement.
- Snowbird programs such as those at Home Depot and CVS make full use of the seasonable availability of retirees—snowbirds who move from Michigan-Ohio to Florida over the seasons[23].

Employers who participate in these types of programs observe a direct correlation between how they treat their employees and what customers think of the organization.

"It helps those customers who "like" their products to move onto "loving" their products, which increases customer loyalty, which ultimately benefits the company," explained one participant.

Additionally, the less successful of these case studies clarify that successful programs aren't simply based upon the actions of an understanding employer who allows a more flexible atmosphere. Instead, successful programs are those that make work meaningful to employees and increase the desirability of their jobs. Flexibility, it must be remembered, is just one tool among many to encourage greater employee engagement.

As participants discussed actionable strategies, it was important to consider a number of key elements in the development and propagation of voluntary practices.

- Proponents of the voluntary adoption of promising practices suggest that the agenda for creating equitable, flexible workplaces can move forward faster with healthy competition among employers; thus, providing an alternative to government involvement in decision-making. They ask: what real-life examples exist that support this idea, and are there additional examples of public policy and voluntary practice complementing each other so that they can create win-win situations for all involved? Concerns raised about a voluntary-only adoption process were also expressed. It was asked: If change agents leave this movement toward flexible, equitable workplaces to voluntary, market-based changes and do not work to make it a "policy," do they make it vulnerable to fluctuations in the economy or new management trends that can be revoked in the future when companies can't "afford" to be flexible?

---

[20] Levin-Epstein, Jodie. Getting Punched: The Job and Family Clock. Center for Law and Social Policy. 2006. <www.clasp.org>
[21] TimeCare: Workforce Planning. <www.timecare.com> ; Also see, Workplace Flexibility for Lower Wage Workers. Corporate Voices for Working Families. 2006. <www.cvwf.org>
[22] Workplace Flexibility for Lower Wage Workers. Corporate Voices for Working Families. 2006. <www.cvwf.org>
[23] Ibid

- Research on the implication of workplace practices would be very helpful to employers and others trying to understand how such issues as minimum wage, immigration, etc. impact stakeholders.
- The scalability of practices must be considered when looking at innovative programming. To disseminate them and spur adoption, it is critical to consider how they can be scaled up or down or adapted to different industries and workplace designs.
- The role of managers in the adoption and success or failure of voluntary workplace practices cannot be underestimated. Support for managers including training and ongoing support to manage the change process involved in the development of different workplace cultures is critical to their success. There's a certain level of self-management among employees, but more visible employees help set an example. If the standard executives establish is a 60-hour work week that includes sending e-mails during weekends, then that becomes the organizational standard and support for flexibility dissolves.
- To encourage the adoption of promising practices in all size employers, small companies need a space to talk about what they can do that the big companies cannot. Their own successes in developing equitable and flexible workplaces need to be mined as well. For example, what do small businesses do naturally that can be used for other companies?
- What is energizing that adoption of work-life flexibility ideas? – Explained one participant, in her workplace it was not work-family issues or working parent concerns that pushed its widespread adoption, it was efforts by younger employees who demanded flex-time be more inclusive and less selective, e.g., allowing time off for school, professional development opportunities, etc.

Lessons can also be learned from failures in work redesign. Not every option, for example, works for every workplace culture. What many of these experimental programs indicate is that communication with and between staff and management is the best problem-solver and is what is needed in most situations to make flexible work options viable.

## *Work-Life Effectiveness <u>Policy</u> Discussion*

Discussion Topic: What policy or government programs exist that impact work-life effectiveness options? Overview of key policy areas or government programs related to work-life effectiveness and what is in development by policymakers, advocates, or employers.

### *Speakers:*

- David Gray, Director of the Workforce and Family Program, New America Foundation
- Kaitlyn Kenney, Policy Research Consultant, Workplace Flexibility 2010, Northeastern University
- Karen Furia, National Office Coordinator, Department of Labor-Women's Bureau

The synthesized version of the discussion which follows the abstracts is based on notes taken during the three table discussions on this topic as well as insights offered during informal discussions throughout the day. The summaries may or may not reflect the views of all of those who participated at a given table during the course of the day.

# *ABSTRACTS*

## *ABSTRACT A*

New America Foundation
Workplace Flexibility 2010
*Work-Life Effectiveness Presentation*
Prepared By**:** David Gray, Director of the Workforce and Family Program, New America Foundation, and Kaitlyn Kenney, Policy Research Consultant, Workplace Flexibility 2010, Northeastern University

**Section 1: Overview of Topic/Research**
Creating flexibility in the amount, location, and scheduling of work has been shown to be beneficial for employees and their workplaces. This presentation on work-life effectiveness has three primary foci:
- Consideration of evidence illustrating the need and desire for flexible work options as a mechanism to improve work-life balance and effectiveness;
- A brief review of current business practices to promote work-life effectiveness; and,
- A discussion of what role government plays in increasing access to workplace flexibility in ways that work for employers and employees.

**Section 2: Clarify Implications for employers, stressing any return on investment implications**
Much of the research to date regarding the impact of work-life effectiveness programs, such as flexible work options, has consisted of case studies among those organizations that have opted to implement flexible work or other family friendly workplace policies. For example, Corporate Voices for Working Families has published a report entitled, *Business Impacts of Flexibility: An Imperative for Expansion*, based on surveys of its 46 partner organizations and their experience with flexibility initiatives. [24] Additionally, a number of evaluation reports address the impact of flexible work practices on federal workers and federal governmental agencies.[25] Finally, there have been a few empirical analyses investigating the relationship between flexible work options, their impact on work-life effectiveness, and subsequent economic and managerial impacts on employers.[26] Collectively, these results illustrate flexible work options have had positive impacts on:
- retention
- recruitment
- employee engagement and commitment
- productivity
- efficiency of operation
- improved customer service
- profits, revenues, and shareholder value

---

[24] Corporate Voices for Working Families (2005, November). *Business impacts of flexibility: An imperative for expansion*. Washington, D.C.: Author.

[25] See for example, U.S. General Accounting Office (1997). Report to the ranking minority member, Subcommittee on civil service, Committee on Government Reform and Oversight, House of Representatives, Federal Workforce: Agencies' policies and views on flexiplace in the federal government (GAO/GGD-97-116). Washington, D.C.: U.S. Government Printing Office; U.S. General Accounting Office (1985). Statement of Rosslyn S. Kleeman, Associate Director, General Government Division before the Subcommittee on Human Resources of the House Civil Service and Post Office Committee: Flexible and compressed schedules in federal agencies. Washington, D.C.: U.S. Government Printing Office; Saltzstein, A.L., Ting, Y., Saltzstein, G.H. (2001). Work-family balance and job satisfaction: The impact of family-friendly policies on attitudes of federal government employees. Public Administration Review 61(4), p. 453; and U.S. Office of Personnel Management (1998). A review of federal family-friendly workplace arrangements. Washington, D.C.: Author.

[26] See for example, Meyer, C.S., Mukerjee, S., Sestero, A. (2001). Work-family benefits: Which ones maximize profits? *Journal of Managerial Issues* 13(1), p. 38; Halpern, D.F. (2005, May). How time-flexible work policies can reduce stress, improve health, and save money. *Stress and Health 21(3)*, 157-168; and Lineberry, J. & Trumble, S. (2000, Winter). The role of employee benefits in enhancing employee commitment. *Compensation & Benefits Management* 9-14; and Landauer, J. (1997, July). Bottom-Line Benefits of Work/Life Programs. *HR Focus*, 3-4.

**Section 3: Clarify implications, if applicable, for employees/working women or policymakers**

In light of the changing demographics of the workforce—more women in the workforce, an increase in the number of families in which both parents work, an increase in single parent working families, a growing older workers population—many workers need access to workplace flexibility in order to balance their work and family responsibilities and facilitate workforce attachment across the lifespan. Additionally, the younger generation of workers, Gen Xers and Gen Yers, seem to prioritize a work structure that will allow them time outside of work to spend with family.

A glimpse at some of the data currently available regarding the need and desire for flexible work options across demographic groups indicates the positive impact employees consider flexible work options can have on work-life effectiveness. For example:

- According to Family and Work Institute's (FWI) National Study of the Changing Workforce (NSCW), nearly 80% of employees would like to have more flexible work options.[27] Another report by the John J. Heldrich Center reinforced that the vast majority of employees were concerned with having flexibility in their work schedules, and also revealed that this work option is particularly important to women; 43% of women reported flexibility in work scheduling was extremely important as compared to 33% of men.[28]

- In a national survey of workers ages 50-70, over 70% reported that they expect to continue to work at least part-time after retirement.[29] While some workers need to continue work in retirement for financial reasons, others feel work has a positive impact on quality of life by promoting continued usefulness and physical and mental well-being. In continuing their employment, older workers indicate a desire for alternative schedules, shorter hours, and longer vacations.[30]

- According to a nationally representative survey of adults 21 and over addressing work priorities, men in their 20s and 30s, and women in their 20s, 30s and 40s indicated that a work schedule that allows them to spend time with their families is the most important job characteristic.[31]

For more data on employee needs, see:
http://www.law.georgetown.edu/workplaceflexibility2010/documents/FF_BW_FI_Fact.pdf

http://www.law.georgetown.edu/workplaceflexibility2010/definition/general/STO_FactSheet.pdf

http://www.law.georgetown.edu/workplaceflexibility2010/definition/general/FWA_FactSheet.pdf

**Section 4: What roles can or have researchers, policymakers, employers or employees play/played in this area/topic?**

As America increasingly struggles with the implications of various changes and shortages in the current workforce, it is critical that employers gain a better understanding of the needs and desires of employees in order to retain existing employees and attract other viable workers. In addition to providing employers and policymakers

---

[27] Galinsky, E., Bond, J.T., & Hill, E. (2004). *Workplace flexibility: What is it? Who has it? Who wants is? Does it make a difference?* New York: Families and Work Institute, p. 21.

[28] John J. Heldrich Center for Workforce Development & Center for Survey Research and Analysis (1999, March). *Work and family: How employers and workers can strike the balance*. New Brunswick, New Jersey & Storrs, Connecticut: Author, p. 6.

[29] AARP (2003). *Staying ahead of the curve 2003: The AARP working in retirement study*. Washington, D.C.: Author, p. 4. Retrieved online June 2005, http://assets.aarp.org/rgcenter/econ/multiwork_2003.pdf.

[30] Penner, R.G., Perun, P., Steuerle, E. (2002). L*egal and institutional impediments to partial retirement and part-time work by older workers.* Washington, D.C.: The Urban Institute. Retrieved April 2005 from, http://www.urban.org/UploadedPDF/410587_SloanFinal.pdf.

[31] Radcliffe Public Policy Center (2000). *Life's work: Generational attitudes toward work & life integration.* Cambridge, MA: Author, p. 3.

with further insights into the specific needs of employees, researchers also need to further develop empirical literature that evaluates ways in which flexible work options impact business. Policymakers and businesses should consider the lessons learned from the available research and work collaboratively to consider ways in which employers and/or policymakers might provide policies or incentives to better enable the restructuring of traditional work schedule models. In addition, they should discern whether there is a role for government (and if so, what it would look like) in enabling organizations to offer such policies.

**Section 5: Discussion Starter Questions**

- In your mind, what constitutes "workplace flexibility" or "flexible work options"?
  - See for example, http://www.law.georgetown.edu/workplaceflexibility2010/documents/2005_1017_Definition_Flexcopy.pdf
- Do you have any examples of ways in which your organization (or one you have studied) provides flexible work options or policies?
  - See for example, http://www.law.georgetown.edu/workplaceflexibility2010/definition/general/FWA_CaseStudies.pdf
- In what ways has existing policy, e.g. FMLA, impacted your workplace practices?
  - See for example, http://www.law.georgetown.edu/workplaceflexibility2010/law/fmla.cfm
- What are some of the greatest concerns associated with or barriers to adopting flexible work options?
- Are there any ways in which these barriers might be minimized or removed?
- Are there any policy tools that might better equip employers to offer and administer flexible work options?
- What is government's role in increasing access to workplace flexibility in a way that works for employers and employees?
- What other work-life effectiveness issues should be considered?

## *ABSTRACT B*

Department of Labor-Women's Bureau
*Work-life Effectiveness Policy Presentation*
Prepared By: Karen Furia, National Office Coordinator, Department of Labor-Women's Bureau

**Section 1: Overview of Topic/Research**

*The Women's Bureau Flex Options Project*
     The Women's Bureau of the U.S. Department of Labor promotes "Better Jobs! Better Earnings! and Better Living!" through demonstration projects. Three years ago the Bureau developed <u>Flex Options for Women</u>. The goal of the project is to encourage employers to enhance and/or develop flexible workplace policies. Over the past three years the Bureau has implemented this project through regional offices based in New York City, Chicago, Dallas, Kansas City, Denver, San Francisco and Seattle. This year we are going to expand the program to this area.

**Section 2: Clarify Implications for employers, stressing any return on investment implications**
     As a result of this project about 200 employers that serve over 370,000 employers have created or enhanced over 350 flexible policies and programs. The Bureau provides a variety of tools that employers can access to learn about flexible policies and programs.
- Face-to-Face meetings
- One-to-One Mentoring
- An informative Website
- Materials
- Quarterly free teleconference calls
- And this year a National Gathering in Arizona

     The project itself is flexible and continues to change to meet employer challenges. The range of flexible project includes formal and informal arrangements. Programs develop vary and include: development to telecommuting guidelines, use of teleconference calls instead of meetings, establishment of power hours, emergency flexibility, college class flexibility, shorter hours on Friday, take your child to work, job sharing, part-time arrangements, expanding the culture to accept flexibility etc.
     Interested employers are encouraged to join the program by being a mentor, a participant and/or sharing their best practices that are then posted on the we-inc website.

## *Discussion Synthesis: Work-Life Effectiveness <u>Policy</u>*

<u>**Trends**</u>

Concerns exist about the long-term sustainability of work-life programs and policies. As in other discussions, the primary tool for developing work-life effectiveness for many employees was often identified as workplace flexibility. Whatever the format, work-life programming is seen as vulnerable and subject to reduction or elimination for a variety of reasons. These reasons encompass challenges in implementation as well as the relatively undocumented state of bottom-line benefits to companies. The widespread lack of training for managers to help them deal with the implications of flexible work-design options means that the impact on supervisor work-loads and their perceived reduction in control over scheduling options hampers the spread and success of flexible programs. Vulnerabilities for flexibility programs also lie in their susceptibility to changes in the economy. For example, downturns in the economy can soften the labor market, reduce the demand by employers for employees, and lessen their business incentive to offer recruitment and retention aids. Thus, both advocates of public policy solutions and voluntary adoption of practices see the need to quantify bottom-line benefits to employers and society for providing sensible work-life solutions.

Public policy is one valid avenue for providing and supporting solutions to work-life issues because these issues affect a broad range of citizens across their life-span. Policy can help buffer work-life programs from rapid swings in the economy. Conversations about government policies that impact the work-life intersection define public policy in the broadest sense as government support or incentives that promote a particular workplace policy or practice (i.e.) flexible workplaces. This broad definition also includes the use of government resources to support or influences the voluntary adoption of a particular workplace policy or practice.

When helping employers and employees manage the work-life intersection, current public policy relies heavily on fostering the voluntary adoption of work-life practices such as the Department of Labor –Women's Bureau's Flex-Options program that encourages voluntary adoption of flexible work options by providing employers with educational services, business-to-business mentoring opportunities, and promoting the sharing of promising practices. The government also acts as a model for flexible workplaces with the federal government in particular … having a flexible work policy in effect[32]. Participants explained that outcomes from federal employee workplace options show both the benefits and detriments to implementing a rigid menu of flexible options[33]. At the NES it was stated that there was a natural bridge between the promotion of voluntary practices and the development of formal public policy. By studying promising voluntary practices, it is possible to learn under what circumstances government should write or rewrite policy to remove barriers to the expansion of successful voluntary policies and programs. This examination also enables more employers to adopt such policies by providing funding, incentives or educational opportunities.

A secondary debate developed around how far work-life proponents could rely upon voluntary adoption as a means to expand flexible work options and at what point government support or intervention becomes necessary. To some attendees, there appeared to be a limit to expanding solutions through voluntary practice because at some point the practices reach maximum penetration for employers inclined to see the business case. After that, moving forward requires policies and regulations that provide clearer definitions for flexibility, help to create cultures of flexibility within businesses or communities, or incentives for adoption. The counter argument was made, however, that if there is not a solid business case for adopting or retaining work-life programs, forcing change may provide solutions that create more problems than they solve. Understanding why more businesses are not adopting work-life flexibility as a tool for recruitment and retention could be a critical step in understanding where the line between voluntary adoption and public policy lies. Clearly, differentiations among the sizes and industries of employers may provide some answers as to how far voluntary adoption and policy development should go. It is also critical to understand whether there are societal benefits to work-life options that are worth government offsetting some of businesses expenses in providing them. For example, employees appear to benefit from flexible work options by a

---

[32] 5USC Chapter 63-Leave. U.S. Code. <http://uscode.house.gov/download/pls/0563.txt>
[33] Levin-Epstein, Jodie. <u>Getting Punched: The Job and Family Clock</u>. Center for Law and Social Policy. 2006. <www.clasp.org>

reduction in stress and stress-related illnesses. Does the reduction in health care costs and lost productivity make both a societal as well as business case for offering them?

A lack of consensus exists about whether workplace flexibility can work in every industry. It is feared that broad policy changes could harm rather than help employers and employees under those circumstances. An example provided by Summit participants related to health care or senior care workers in which there is a staff shortage. Flexible work options, cautioned one participant, could compromise the quality or continuity of care as well as be a large financial cost to providers. However, other participants cautioned that it is important to understand that the term "flexibility" is a broad umbrella under which an extremely wide array of work design options exists—ranging from flexible start and end times to mechanisms that provide cover for short-term emergency absences (i.e. picking up an ill family member during work-time) to full-scale alternative schedules[34]. Thus the ability of flexible work designs to address its own inherent constrictions among different industries or workplace cultures may determine its long-term sustainability.

When policy is developed, it needs to reflect the reality that flexibility is not one-size fits all. Participants expressed concerns about public policies that mandate specific flexibility options. These rigid definitions of flexibility can be a detriment to some industries such as the health care fields, as described in an earlier example. There was also concern for policy mandates that do not have dollars attached to help defray the costs of transforming the workplace such as providing management training, covering the costs of increased paperwork and tracking, etc. Policies need to work for both businesses and employees if they are going to be win-win, explained participants. Flexibility needs to be *flexible* in its implementation and understood to be *flexible*. It should also be understood that success in instituting a flexible policy or program may not rest on everyone being on a flexible schedule at the same time, rather it is an option for those who want to ask for the option and who could benefit from it.

At the heart of the debate on how and when to utilize public policy is "How best to create a culture of flexibility within employers and the nation at-large?" Should culture change be encouraged through policies mandating change in workplaces, policies that offer incentives to voluntarily adopt flexible programs, a combination of voluntary adoption and policy, or should it all be left up to market forces? Participants pointed out that in some cases policy could be equally well-used in updating or removing current regulatory or legal barriers that are preventing employers from adopting more flexible options or that discourage employees from taking them when offered. Currently, some regulations originally designed to offer support and safety nets for employees may now be discouraging the adoption of flexibility even when it is desired by both employer and employees. For example, the ability of employers to offer phased retirement options to maturing workers might be inhibited by current legislation that impacts tax deductions, access by employees to pension benefits, and health care plans etc. Phased retirement is when an employee works for their same employer within the same system on a reduced schedule[35].

Conversely, rather than legislating what forms flexibility should take, legislating a "right to ask" option was offered as an alternative beginning step in creating a national culture of flexibility. Such legislation would allow employees to ask their employers for flexible work options while not mandating that employers must grant it. Employees would be tasked with developing a plan to share with employers clarifying how work would be accomplished under the flexible schedule, while employers would be asked to give the request a fair hearing. Under this type of legislation, similar to one in effect in the United Kingdom, employers would be prohibited from retaliating against an employee that requests a flexible option but would not be required to accept the request[36]. Participants said that the success of such a law would lie in its ability to remove the onus from both employers and employees for judging or justifying what a good reason is for allowing flexibility (i.e. sick family member versus educational advancement).

---

[34] When Work Works: Making Work "Work." Families and Work Institute. 2007. <http:familiesandwork.org>; Also see: Workplace Flexibility 2010. <http://www.law.georgetown.edu/workplaceflexibility2010/index.cfm>

[35] Brainard, K. (2002, October). *Phased retirement overview: Summary of research and practices.* Prepared for the NASRA Phased Retirement Committee. Retrieved July 26, 2005, from http://www.nasra.org/resources/Phased%20Retirement%20Overview.pdf; Also see: Sloan Work and Family Research Network. < http://wfnetwork.bc.edu/glossary_template.php?term=Phased%20Retirement,%20Definition(s)%20of>

[36] Levin-Epstein, Jodie. Getting Punched: The Job and Family Clock. Center for Law and Social Policy. 2006. <www.clasp.org>

**Common Ground**

Policy is not the only external force that can drive widespread societal change. For example, reactions to recent natural or man-made disasters induced some employers to develop emergency response plans that included teleworking and other remote work options. Some cities faced with growing traffic congestion have engaged employers in developing telework and flexible work initiatives to reduce traffic congestion and pollution. The broader issue of work-life effectiveness which encompasses flexibility is a policy-level question because it deals with the larger question of what is valued in society. This is a critical question for policy to answer because it determines what kind of baseline of work-life balance government is willing to support with tax dollars, mandates or incentives.

A societal benefit to the large-scale implementation of work-life flexibility is that it holds the potential to expand the available labor pool. While employers may consider that the needs of one set of employees is being met by such programs (i.e. working parents), there are, in fact, great multiplier effects with flexibility for any group that appears difficult to serve—people with disabilities, caregivers, impending retirees—that can help employers expand their labor force options by expanding their acceptance of alternative work design options. Innovative solutions to universal work-life issues hold the promise of engaging an expanded pool of employees into the workforce who will, in turn, benefit from the related income and career opportunities.

There appears to be an overall sense that policy can play a productive role in getting employers and employees to a place where they can discuss win-win solutions to work-life issues. If a case is to be made for policy-based expansion of work-life programming and flexible workplaces, flexibility needs to be looked at not just as a means of altering hours but of keeping employees engaged and productive across their life-span.

Understanding that the demands on employees' time and energy changes across that life span and can constrain their options can help employers who wish to retain experienced and committed employees. This increased insight into employee motivations can help employers craft work design solutions that can better deal with on-ramping and off-ramping or phased retirement issues. Similarly, policymakers that understand this life-span work paradigm and its effect on employers and employees may be better able to craft policy that enables employers to offer adaptable solutions as their workforce changes over time. Doing so removes impediments to fostering flexible options that help them keep valued employees and retain their intellectual capital.

While there does appear to be interest in policies that support the development of work-life effectiveness, there are problems envisioned by businesses that can make their successful adoption doubtful. To reach common ground with employers, their concerns about whether the solutions offered for work-life issues may be more costly than they are worth must be addressed. Some employer concerns that suggested policies would need to address include:

- Wage-focused issues—How do businesses replace the wages of someone who takes time off? Do they allow people to accumulate time off through overtime thus creating time banks people can use for sick leave, phased retirement or sabbaticals? Time banks are shared pools of leave to which employees contribute time. The question emerges again, however, who pays for this banked time? Does it get banked like pre-tax dollars for a 401 (K)?

- Incentives for business—What tax or other incentives can be made available to businesses to foster flexible work environments without mandating the form that flexibility takes? This combination of incentive with flexible options was held up as something that businesses might respond to well because it allows them the opportunity to tailor solutions to meet their own needs and workplace structure.

- Opening up discussions between employers and employees without opening up liability—How could more open communication between employers and employees be fostered by government activity? Open communication allows employers and employees to proactively discuss the option of flexibility without costly repercussions to the employee or the employer. Would this look more like a "right to request" law or a public service campaign?

Deciding when and where government policy is an effective spur to the development of work-life solutions will rely heavily on the availability of accurate data. Capturing and sharing data that accurately describes benefits, challenges and choices in work-life options (especially) flexibility for employees and employers is critical in driving forward both voluntary acceptance of promising workplace practices and in informing the development of win-win and, by implication, sustainable public policies. Government can play a role in this process by helping

capture information through existing sources such as the Census Bureau, Department of Labor, and the Bureau of Labor statistics or by funding such research. It could also offer guidance on the types of data that employers can capture on their own to accurately describe the impact of work-life options within their workplace.

Public policy that affects workplaces is currently being developed at the local, state, and national levels. In developing new policy, when and where the most appropriate level for government interaction is needed could depend upon the size of the employer being targeted. The relative size of employers influences the availability of resources and the options open to them for creating effective work-life programs. Flexibility can be useful in both large and small businesses but the actual process of implementation and the needed supports can be quite different.

These differences would need to be reflected in any suggested legislation or regulations. For example, small businesses may be more proactive in offering flexible work options but they are also much less formal in their policies than larger employers. Large businesses can afford to bring in consultants to help them develop workplace programs but small businesses rarely can. Thus, providing publicly available educational opportunities to help businesses with the change process by offering grants, conference, webinars, how-to guides, and templates for forms or employee surveys would be particularly beneficial to small and medium-sized employers. These are also supports that can be provided at the local, state, or the federal level.

Policy is not a one-size-fits-all proposition for employers or employees. As policy is being developed, the starting point should be to remember that work-life needs exist for many different types of employees and not simply for working parents. Policy development needs to take into account providing incentives not only for employees to offer it but for the employees to make use of them—policy can help deal with the potential impediments to use.

Policy has to be developed with an understanding to the resources, including time and money, needed to implement and support it. A checklist of questions to consider when developing policy that creates win-win policy solutions might include some of the following ideas:

- How many decisions around work design will be made by employers and employees? Within the development of public policy, it is important to fully understand what rights are to be allowed to each of the major stakeholders: employers, employees, states, locales, consumers and understood in a way that it clarifies the bottom line impacts for each group including costs, benefits, and a way to measure the success of culture changes.
- Does it provide or support training for managers to help them understand how to balance employee needs with productivity requirements or explain how to implement flexible work schedules?
- Are there uniform data measurements that can help employers and policymakers determine when programs are successful? The effects of current limited examples of policy are in the early stages of documentation and it is not easy to say if public policies are driving changes in behavior or expanding flexible or other work-life options. This makes it harder to make the case for what public policy and government intervention can accomplish in this arena.
- Does the policy offer businesses the opportunity to tailor solutions to meet their specific workplace needs?
- Does the policy help open up discussions between employers and employees?
- How much of U.S.' tax dollars should be spent establishing a baseline for equitable, flexible workplaces (i.e.) supporting paid sick leave? Are the states or local governments to be engaged in paying for or implementing the policy?
- Does it provide answers to the wage replacement question? Solving the wage replacement issues for certain types of flexible options such as sick leave, part-time, long-term or short-term disability or leave is a critical one for both employers and employees because it has significant impact on their mutual bottom-line.

**Actionable Strategies**

Addressing important questions on opportunity costs, rights, and responsibilities becomes a critical strategy in itself when considering what types of policies to develop in support of successful workplaces. How much of America's tax dollars should the country spend on establishing a baseline for employees that supports work-life options enabling them to be available for work and productive on the job (i.e. paid sick leave)? Are the states going to be involved in the implementation of policies or bear any of costs associated with them? How many decisions are going to be left to the employees and employers? It is important to clarify what rights are allowed to each.

Solving the wage replacement issues for certain types of flexible options such as sick-leave, part-time work, or long or short-term leave is a critical one for employers and employees. It can be a prohibitive cost for both groups. Currently, many employees who qualify for leave under the Family and Medical Leave Act do not take it because they cannot afford the time off. For employers, holding a position open for an employee on FMLA means not only paying out benefits to the employee on leave but covering the costs of temporary help or spreading the work among other employees.

Thoughtful analysis of potential policy options related to work-life effectiveness is required. To that end, the following questions were offered to both discussants and to those pondering new public policy:

1) Considering the mismatch between existing law, regulations and policy and reality, why has the federal telework initiative been minimally effective in increasing the number of workers who are teleworking[37]?
2) If the U.S. were to offer some form of wage replacement for leave time from work, how might this be organized or structured? From whom would the money to run this program come? How would it be tracked?
3) What are some ideas that might work for business in terms of incentives for offering flexible work practices?
4) How might a conversation be facilitated between employers and employees regarding what might work in terms of work structure and meet the needs of both?
   - Smaller employers seem to be able to "work it out." How do we make the broader policy applicable to larger businesses?
   - What about the notion of a right to request with an appeals policy (something akin to the United Kingdom policy)?
   - Current policy that does exist within organizations/corporations or abroad, seems to suggest going down the road of encouraging this conversation between employers and employees to determine potential arrangements. Does this seem a reasonable approach in the United States?
5) When considering the issues of wage replacement, there are examples in the United States such as programs made available in California[38]. What do we know from these examples about what works? When developing something similar at the federal level or within other states, what factors need to be considered?
   - Is there a way to create a fund where employers are paying into it along with government to provide wage replacement?
   - Who should pay into such a fund?
   - Should taxes be used to supplement the fund?
6) What are some potential incentives that could be considered for prompting businesses into adopting workplace flexibility policies? Some ideas offered included:
   - Government supported programs that lead employers voluntarily into adopting promising practices such as the Department of Labor-Women's Bureau Flex-Options program
   - Programs that provide subsidies that allow organizations to hire consultants to help them figure out which policies would work best in their organization
   - Tax incentives such as credits or deductions

However, using taxes for this purpose leads to the philosophical question regarding what choices or tradeoffs are citizens willing to make? Is government responsible for offering some benefits? Employers? Where do we place this responsibility?

It seems logical to believe that employers are not going to automatically accept policy changes, especially mandated policy changes. One policy suggestion offered in support of employers who want to voluntarily develop or expand work-life effectiveness options was to develop outlets where businesses could go to receive valuable information regarding work-life practices and policies. Such outlets are currently housed at various nonprofits such as BPW Foundation's Rawalt Online Resource Center or the online library of Workplace Flexibility 2010.

Supporting public-private partnerships to promote the development of flexible work practices was another suggestion. Finally, the discussion suggested that grants be offered through the Small Businesses Administration (SBA) for use by smaller organizations in the development of work-life policies.

---

[37] "The Status of Telework in the Federal Government 2005." Office of Personnel Management. 2005. <http://www.telework.gov/documents/tw_rpt05/index.asp>; Also see: Worklife: Telework. US. Office of Personnel Management. <http://www.opm.gov/employment_and_benefits/worklife/workplaceflexibilities/telework>
[38] California Employment Development Department. <http://www.edd.ca.gov>

## *Diversity Voluntary <u>Practice</u> Discussion*

Discussion Topic: What are employers and others doing to adapt to and engage diverse work populations? What are the benefits, challenges and strategies?

### *Speakers:*

- Jennifer E. Swanberg, Ph.D., Associate Professor, University of Kentucky
  Executive Director, Institute for Workplace Innovation
- John Lancaster, National Council on Independent Living, Executive Director

Various participants provided their insights on the topic area. The synthesized version of the discussion is based on notes taken during the day and may or may not reflect the view of those who participated at a given table during the course of the day.

# *ABSTRACTS*

## *ABSTRACT A:*

Institute for Workplace Innovation
*Voluntary Diversity Practices Presentation*
Prepared By: Jennifer E. Swanberg, Ph.D., Associate Professor, University of Kentucky, Executive Director, Institute for Workplace Innovation

**Section 1: Overview of Topic/Research**

Diversity within organizations takes on many different meanings. For the purpose of this discussion, diversity refers to the challenge of creating a work environment that engages a diverse population of workers, be it hourly workers, older workers, or working mothers. The discussant can speak to how diverse populations of workers (people w/ disabilities, older workers, and hourly workers) may have different needs. The entire topic of flexible work options can be discussed as an organizational culture response. Based on the speaker's particular research, this particular abstract focuses on the diverse needs of workers employed in lower wage hourly jobs.

- Over the past two decades, 86% of the new job growth in the U.S. has been within service-based industries, and this trend is predicted to continue. In fact, according to the Bureau of Labor Statistics low-wage service occupations are second in terms of the fastest-growing and predicted job growth through 2012. Yet, employers have generally neglected the concerns of employees in low-wage jobs. In particular, little attention has been paid to the work/family challenges encountered workers employed in low-wage jobs.
- Furthermore, the job quality and workplace conditions inherent to many of the jobs that pay low wages place additional burdens on workers. In these types of jobs, workers often have little say about when, where, and how long they work and they are often required to work evenings, nights, rotating shifts, or on weekends. Job schedules may be out of sync with family care giving responsibilities, bus schedules or school schedules. Moreover, compared to jobs that pay higher wages, lower-wage jobs are less likely to offer flexible schedules—the exact workplace practices that have been shown to help reduce the stress and work/family strain often associated with trying to meet the often-conflicting demands of work and family care giving. Additionally, employers often adhere to strict arrival times with penalties for tardiness.
- In many industries, employees in lower-wage jobs are the first point of contact that customers have to the business. As such, some employers have begun to recognize the importance of investing in improving conditions of entry level jobs. This discussion on workplace diversity will focus on benefits and strategies associated with creating flexible and effective workplaces for hourly workers.

**Section 2: Clarify implications for employers, stressing any return on investment implications**

Analysis conducted by the Families and Work Institute using the *2002 National Study of the Changing Workforce* suggests that among lower wage workers in low-income households a variety of workplace factors contribute to important organizational outcomes including employees' job satisfaction, job engagement, and job retention.
- Factors associated with greater job satisfaction for low wage workers include: involvement in management decision making; flexible workplaces; learning opportunities on the job; access to fringe benefits; and supervisor support of work and family issues.
- Factors associated with job retention include: employer provided education/training programs to enhance job skills and fringe benefits.
- Factors associated with job engagement include: co-worker team support

Considering the research findings, employers may wonder how to re-conceptualize jobs so they provide flexible work arrangements, learning opportunities, or input into decision making. After all, the nature of the lower paying hourly job suggests a rigid adherence to a set schedule, little or no advance notice of their weekly schedule, or job-site-specific tasks allowing for no opportunity to work from home. Yet, innovative employers have found

ways to provide hourly workers input into decision making, job flexibility, and learning opportunities on the job. Below are a few examples:

- Input into decision making: Akebono Brake Elizabethtown, a manufacturer of brakes and brake parts located in Hardin County, Kentucky has strategically created an "open-door" management style. This type of communication system allows all 1,100 associates to have a voice in all aspects of the company's operation. Associates are encouraged to go directly to the Plant Manager or Vice President of Corporate Relations if they have ideas, questions, or concerns. The company also has a company "hotline" that allows associates to anonymously report day-to-day production and human resource concerns. As one element of broader organizational employee-first work culture, input into key management decision making has contributed to an outstanding retention rate. 50% of the workers employed at Akebono have been employed there more than 10 years.
- Creating Flexible Work Arrangements for Hourly Workers: Preliminary research findings from a study conducted in a retail firm suggest that the following employee schedule strategies are associated with job satisfaction and commitment to the job among employees in lower-wage hourly jobs:
  - Giving employees some input into their weekly schedule and developing a mechanism for employees to swap or cover shifts at the last minute should a personal matter arise.

### Section 3: Clarify implications, if applicable, for employees/working women or policymakers

- Research suggests that modifying workplace practices such as adopting flexible work arrangements can offer a range of benefits to employees and employers, including enabling employees to reduce their work and family schedule conflicts (with the possible outcome of reducing absenteeism) and increasing employees' access to work time during non-traditional hours (with the possible outcome of enhancing productivity and extending customer hours). Yet, low-wage workers are the least likely to have access to flexible work arrangements.
- Barriers to implementing such flexible work arrangements for hourly wage workers are often associated with management's concerns about the increased supervisory effort required to provide such workplace practices. Moreover, supervisors are also concerned about equity issues. Yet, preliminary research findings suggest that supervisor responsiveness to hourly workers' schedule requests may be associated with employee retention and job satisfaction.

### Section 4: What roles can or have researchers, policymakers, employers, or employees played in this area/topic?

Research findings imply that effective workplace practices are associated with the retention and job satisfaction of hourly workers. Yet, there has been a resistance in the employer community to adopting workplace practices that engage workers in lower-wage hourly jobs.

- Recent research findings suggests that quality work environments that allow for some form of workplace flexibility, decision-making into management decisions, and learning opportunities on the job lead to better outcome for employees and employers. There needs to be a more deliberate effort to educate businesses about these findings and to encourage adoption of these workplace policies.

### Section 5: Discussion Starter Questions

- What are some of the challenges associated with managing a lower-wage hourly work force?
- How are these challenges different from those of managing a professional salaried workforce?
- What are some of the benefits associated with managing a lower-wage hourly work force?
- What management strategies have been employed with this population of workers that has been successful?
- What management strategies have been employed that have not been as successful as one hoped?
- What needs to happen to bring more attention to this issue among employers and policymakers?
- What are the long-term implications if businesses continue to ignore this issue?

## *Discussion Synthesis: Diversity Voluntary <u>Practice</u>*

<u>Trends</u>

An emerging workplace trend is the increasing realization that forces shaping options for workingwomen are, in fact, forces affecting everyone in the workplace including women, men, caregivers, entry-level workers, impending retirees, second careerists, people with disabilities, and employers. Both voluntary diversity workplace practices and public policy in support of workplace diversity can positively reshape the workplace for all employees and expand the labor pool for employers.

"The more that you make your organization diverse, it will begin to diversify even more, naturally because it already has that diverse base," explained a Summit participant.

In business there is an expanding understanding of what diversity means within society and how this new definition plays a role in building workplace cultures. The concept of diversity plays a significant role in work design now because it not only incorporates ideas on ethnicity, race, or age but also work-style and work-life expectations. Building and making use of diversity within an organization requires a deliberate strategy and commitment. Fostering an inclusive workplace culture goes beyond just getting people of diverse backgrounds into the workplace; it also means getting employees involved and keeping them engaged. It is about building a culture of inclusion that is structured to help drive the success of the firm and its ability to meet the organizational mission.

An emergent trend in work design is shifting the paradigm on diversity from being an organizational challenge to being a powerful resource that can be harnessed to drive organizational successes. Deliberative efforts to hire diverse workforce expands the pool of eligible workers for employers. "To have diversity, you have to do diversity," explained a Summit participant.

For national employers, they find they must also look at geographic diversity. People in field offices have very different issues and challenges than those in central offices. For example, developing and enforcing inclusive work environments or programs and policies across state or national borders can be a challenge as employers encounter different laws and local cultures. Diversity can also have multiple layers that make it a challenge for employers to manage. For example, a company may be diverse when looking across its workforce nationally but within local communities it may not exhibit great diversity.

Diversity is not a stagnant concept. Even now, some forward-thinking employers are trying to understand how to meet the challenges of a multi-generational workforce and how to meet the changing needs of employees across their life and career spans as well as how to most effectively engage them in the workplace. Bridging or harnessing differences in knowledge, experiences, and expectations in multigenerational workplaces presents both a new challenge as well as potential business opportunity for employers.

<u>Common Ground</u>

Demographic and societal changes are expanding the dialogue around a business case for diversity and workplace cultures that support diversity. However, it's still a conversation mainly being discussed among early adopters and advocates. New ideas on diversity and its role in work design are often expressed by employers on the leading-edge of change. There is recognition among proponents of workplace diversity that, even under prior definitions of diversity that look only at race, ethnicity, age, and gender, many workplaces simply are not diversified.

"Diversity is not (just) a good idea; it is a business imperative. It has to be the way you do business or else your success becomes at stake in our global worlds," said a Summit participant.

Interestingly, diversity highlights common ground in workplace design strategies. Diversity is not simply about recruiting employees to meet target goals; it's about designing a workplace environment and a workplace culture that engages employees fully within the organization. Workplace flexibility is often the work-design tool that increases the pool of workers for employers while opening up the workplace to populations of underutilized workers such as people with disabilities, caregivers, and impending retirees.

Being able to make the business case for "doing diversity" rather than simply asserting it as the right thing to do is a new trend common among cohorts of workers—impending retirees, caregivers, people with disabilities, women and minorities—striving to find a place in the labor market.

These diverse populations of current and potential employees have made a conscious effort to expand the understanding of workplace diversity … at least for some purposes, beyond insuring the inclusion of demographic profiles (religion, age, sex, sexual orientation) in the workplace. They describe it in terms of its effects on work design and enhancing how work gets done.

## Actionable Strategies

Typically, people operate within their existing spheres. Therefore, to become inclusive or diverse requires a conscious effort. A strong intention must be present to extend beyond one's own comfort zone. Deliberate strategies that emerge from observing voluntary workplace practices encompass training, research, and making the business case for becoming an employer of choice.

Training can play an important role in helping people become more sensitive to other opinions and other world views. In practical management terms, it can also be used to help understand concepts of work design, strategies to engage employees, and capitalizing on concepts aimed at getting work done in innovative ways by harnessing the diverse skills, viewpoints, and ideas of employees.

Research highlights successful strategies for workplace diversity, helps employers and employees avoid the pitfalls of failed ideas, and, by measuring the effect of diversity efforts on productivity, makes the business case for diverse workplace. For example, research done on retail firms, such as Starbucks, shows that companies that mirror the composition/diversity of their communities can achieve positive results[39].

Participants suggested that employers that want to have access to the largest possible pool of employees will want to demonstrate their status as an employer of choice through their benefit packages and work design options. The examples provided by Summit participants included:

- Offering flexible career paths for part-time and full-time employees with pro-rated benefit packages
- Providing telecommuting or other alternative work options that don't require the employee to provide reasons for the work arrangement but rather only require that they provide a suggestion for flexible options that maintain productivity
- Including role models among senior executives who use or exemplify programs and policies; so, that diversity is shown to be in practice and is has not been lost among a clutter of unused policies or programs
- Offering team structures that incorporate the inclusion of employees across job descriptions, divisions, or ranks
- Building into the work plan and budget support for work, social, or affinity networks; affinity networks are groups of employees joined together by common areas of interests such as veterans' networks or women's networks
- Including diversity efforts in the general operating budget
- Incorporating ways to "hear" employees at all levels through mentoring, brainstorming sessions, focus groups
- Offering domestic partner and/or same-sex domestic partner benefits
- Offering training to get at bias in management practices
- Reflecting diverse voices within the media and publicly acknowledging different view points
- Providing self-employment projects that enable the development of micro enterprises that allow people with disabilities to be more financially independent
- Building public-private partnerships that enable workplaces to access more resources

---

[39] Starbucks Diversity.' Starbucks. 2002. <www.starbucks.com/aboutus/SB-DIVERSITY-FIN.pdf>

## *DIVERSITY <u>POLICY</u> Discussion*

Discussion Topic: What is the government's role in supporting employers' diversity efforts that take into account the rapidly changing demographics of the American workforce? Can the government set policy or create guidelines to facilitate employers' practices impacting hiring, retention, and advancement of minorities, persons with disabilities, older workers, etc.?

### *Speakers:*

- Jane Kow, Employment Law Advice, HR Consulting, and Management Training; Diversity Fellow to American Bar Association General Practice, Solo and Small Firm Division, 2006-2007, Jane Kow & Associates
- Sarah Pierce, Senior Legislative Representative of Congressional Relations & Political Affairs,
- AARP
- Chantel Sheaks, Legislative Counsel for Tax and Benefits, Workplace Flexibility 2010 of Georgetown University Law Center

The synthesized version of the discussion which follows the abstracts is based on notes taken during the three table discussions on this topic as well as insights offered during informal discussions throughout the day. The summaries may or may not reflect the views of all of those who participated at a given table during the course of the day.

# *ABSTRACTS*

## *ABSTRACT A*

Jane Kow & Associates
AARP
Workplace Flexibility 2010
*Workforce Diversity Policies: Adapting to and engaging diverse work populations: benefits, challenges and strategies.*
Prepared By: Jane Kow, Esq., Jane Kow & Associates
In Collaboration With: Sarah Pierce, Senior Legislative Representative, Congressional Relations & Political Affairs, AARP; Chantel Sheaks, J.D., Workplace Flexibility 2010, Georgetown University Law Center

**Section 1: Overview of Topic/Research**

**Workforce Diversity Policies: Adapting to and engaging diverse work populations: benefits, challenges and strategies.**

In the face of an increasingly diverse and global marketplace for talent and consumers, how can policymakers help employers adapt effective diversity and Equal Employment Opportunity (EEO) policies and practices that will enable them remain competitive in the 21$^{st}$ century? What is the role of government agencies/policymakers such as the Equal Employment Opportunity Commission (EEOC), Department of Labor (DOL) and others in facilitating employer efforts to increase workforce diversity? Will greater enforcement of EEO laws and/or establishing guidelines for affirmative action practices in both the private and public sectors help in this regard? What are other avenues through which the government can assist employers achieve their diversity objectives? This table discussion will include ideas for diversity policies that impact hiring, retention and advancement opportunities for women, minorities, employees with disabilities, older workers, and gay and lesbian workers.

**The Business Case for Diversity**

1. Demographics of U.S. Women Entrepreneurs/Business Owners
    - Women-owned businesses are increasingly at the center of the country's economic growth. The growth in the # of women-owned businesses was nearly twice that of all privately held businesses between 1997 and 2004. As of 2004, nearly half– 48% of all privately held firms were 50% or more owned by women.
2. The Business Case for Diversity: The U.S. Population Today
    Between 1980 -2000, the minority population of the U.S. grew 11 times as rapidly as whites
    In 2002, the U.S. population looked like this:
    - 69% White (194.8 million)
    - 13% African American (36 million
    - 13.5% Latinos (37.4 million)
    - 4.4% Asian Americans (12.5 million)
3. The View Today: A Tripling Of Certain Minority Groups
    - From 2000-2003, the Hispanic population in the U.S. grew 13% and the Asian population grew 12.5%, both 4 times as fast as that of the total population which showed a 3% growth rate. Both of these groups are expected to triple their population over the next 50 years. Today, 18.7% of the total U.S. households speak a language other than English; over 50% of those speak Spanish.
4. Regional Concentration By Race
    African Americans and Asian Americans tend to be more geographically concentrated than other races:
    - More than half of African Americans live in the South
    - More than half of Asian Americans and Pacific Islanders lived in the West

- Recruitment strategies aimed at diversifying the workforce may need to take into account these regional demographic differences

5. The U.S. Population Tomorrow

By the year 2050 the US population will look like this:

- Whites                         50%
- Hispanic                      24.5%
- African Americans        14.5%
- Asian Americans             8%

6. Age

- Today, there are 24.6 million workers over age 55. 5.2 million or a quarter of this group are 65 years or older. According to the Bureau of Labor Statistics, seniors make up the fastest growing segment of the work force. By 2012, workers 55 and older will make up 19% of the labor force.
- See Legal and Research Summary Sheet: Phased Retirement, prepared by Chantel Sheaks, J.D., Workplace Flexibility 2010, Georgetown University Law Center and Marcie Pitt-Catsouphes, Ph.D. & Michael A. Smyer, Ph.D., The Center on Aging & Work/Workplace Flexibility, Boston College; see also Discussion Abstract prepared by Sarah Pierce, Senior Legislative Representative, Congressional Relations & Political Affairs, AARP

7. Disability

- An estimated 54 million people report having a mental or physical disability and you have a 20% of becoming disabled at some point during your working life

8. Sexual Orientation

- The 2000 U.S. Census reported over 600,000 gay and lesbian families in the U.S.

**Section 2: Clarify implications for employers, stressing any return on investment implications**

- Diversity and EEO policies providing equal employment opportunities for diverse employees in the workplace helps ensure that employers will be able to hire and retain top talent in an increasingly global marketplace for talent in the 21st century.
- Increasing diversity at all levels of a company improves organizational performance through the integration of a variety of perspectives and approaches in decision making, problem solving and strategic planning as follows:
  - Engage a diversity of perspectives increases the likelihood of informed decision making that minimizes conflict and attains buy-in of diverse employee stakeholders
  - Effectively capitalize on differences in perspective and approaches will improve problem solving and increase likelihood of innovative solutions
  - Improve organizational efficiency through strategic planning that takes diversity into account
- Embracing diversity in the workplace will enable employers to meet the challenge of reaching an increasing diverse customer base as the minority population in the U.S. grows dramatically in the coming decades and companies face increased global competition.
- Employers who are able to adapt best practices for fostering a culture that embraces diversity and prepares management to lead a diverse workplace will be better equipped to meet these challenges.
- Implementing diversity best practices will help foster employee retention and minimize the risk of employment discrimination lawsuits, which not only hurt the bottom line, but also can damage the public image of the company along with employee morale.

**Section 3: Clarify implications, if applicable, for employees/workingwomen or policymakers**

It is a win-win situation when employees are afforded equal employment opportunities in the workplace. Employees including women and minorities will benefit from effective leadership that embraces diversity in the workplace and interaction within multi-cultural, multi-lingual, and multi-generational teams in the workplace. This will undoubtedly minimize discrimination claims that often arise when employees perceive unequal employment opportunities based on their protected characteristics.

**Section 4: What roles can or have researchers, policymakers, employers or employees played in this area/topic?**

- Employers and policymakers must work together and take the lead in fostering a diverse and multicultural workforce through implementation of diversity best practices for employee hiring, retention and advancement, as well as EEO and diversity training for managers and employees.
- Government agencies such as the EEOC should enforce EEO laws, investigate claims thoroughly and offer employers and employees opportunities for informal resolution whenever possible.
- Government agencies and policymakers can establish permissible guidelines for affirmative action in hiring, retention and promotion practices in both the public and private sector. They can offer employers training programs, technical assistance, and establish best practices models for EEO compliance and diversity programs. This includes providing resources for employers on the use of various HR forms, procedures and manuals that need to comply with applicable laws:
  - Job application forms, job announcements, and position descriptions that are non-discriminatory;
  - Written procedures for hiring, training and promotions, as well as providing reasonable accommodations for applicants and employees with disabilities;
  - Written procedures for administering employment tests that are non-discriminatory, including any reasonable accommodations for applicants with disabilities; and
  - Employee handbooks, manuals on recruitment and selection, directives on EEO and diversity, and other documents reflecting best practices related to the hiring, retention and advancement of women, minorities, seniors, individuals with disabilities, gays and lesbians.
- Employers should consider implementing leadership development training that includes coaching for women, minorities, employees with disabilities, etc., which be included in strategic planning for future workforce development.

**Section 5: Discussion Starter Questions**

- What are some ways in which the government or policymakers can help facilitate employer efforts to increase diversity in the workplace?
  - Local v. state v. federal government (e.g., On February 1, 2001, President Bush announced the New Freedom Initiative - a comprehensive program to promote the full participation of people with disabilities in all areas of society by increasing access to assistive and universally designed technologies and expanding employment opportunities)
  - Legislative and executive action
  - Training and technical assistance for employers
  - Funding research and task forces to examine bias issues in the workplace
  - Voluntary tax credits/benefits
- How can government agencies such as the Equal Employment Opportunity Commission and the Department of Labor facilitate employer efforts to increase diversity in the workplace?
- What should be the role of policymakers in establishing guidelines for affirmative action, EEO compliance and diversity training and best practices in both the private and public sector?

## *ABSTRACT B*

AARP
*Aging Workforce Presentation*
Prepared By: Sarah Pierce, Senior Legislative Representative, Congressional Relations & Political Affairs, AARP

**Section 1: Overview of Topic/Research**
The fastest growing segment of workers are over the age of 55 (24.6 million workers as of August 2006), with 5.2 million of those workers age 65 and older. As the baby boomers age so does the overall workforce.

**Section 2: Clarify implications for employers, stressing any return on investment implications**

- Three-fourths of companies have policies that address diversity in the workplace
- In FY 2005 the Equal Employment Opportunity Commission (EEOC) reported age related discrimination charges down – 16,585, down 7% from 17,837 in FY 2004
- There will be more jobs than workers
- Positive impressions vs. Negative impressions: an employer who values experience and knowledge vs. an employer who sees cumulative experience as a limitation to new ways of working, and knowledge as being old and outdated.
- More positive characteristics: productive/engaged, innovative, complex problem solvers, strategic minded
- Barriers: attitudes about age, Non-linear career path, surplus experience, little benefit of the doubt, harmful stereotypes

**Section 3: Clarify implications for employees/workingwomen or policymakers**

- 90% are looking for a worker-friendly environment
- 80% would like to learn something new
- 75% want to pursue something they've always wanted to do
- 16% of pre-retirees plan to work for themselves
- 70% of pre-retirees plan to continue working, half foresee working into their 70's
- Flexibility – work-life, phased retirement, benefit options/design, and job structure – 70% are looking for balance; one-third have care giving responsibilities; 20-30% have had major life and/or family changes over the previous 5-years
- Affordability – retirement security, social security, supplemental income – top reason for pre and working retirees to work in retirement
- Two-thirds also want to work to remain active and useful

**Section 4: What roles can or have researchers, policymakers, employers, or employees played in this area/topic?**

- Equal Employment Opportunity Commission (EEOC) involvement – vigorously pursue allegations of age-related bias in the workplace
- Develop EEOC best practices/model policies/and host workshops that assist employers to eliminate age bias in recruitment, hiring, and retention practices
- Enact public policy that affords flexible work options – phased retirement, comp time, and other options that allow innovative schedule design

## *ABSTRACT C*

Workplace Flexibility 2010
*Pension Protection Act Presentation*
See document entitled: *Legal and Research Summary Sheet: Phased Retirement* at
http://agingandwork.bc.edu/documents/Center_on_AgingandWork_Phased_Retirement.pdf.

**Addendum to Attachment**

On August 17, 2006, President George W. Bush signed into law the Pension Protection Act of 2006 ("PPA"). H.R. 2830 generally was the precursor to much of the PPA. The PPA contains the same provision as H.R. 2830 amending the Employee Retirement Income Security Act of 1974 and the Internal Revenue Code of 1986 regarding payments of pension distributions to individuals who continue to work after age 62.

Therefore, under the PPA, a plan, fund, or program will be treated as being made from a pension or retirement plan even if the distribution is made before termination of employment to an individual who is at least age 62 and who is not separated from employment at the time of the distribution.

## *Discussion Synthesis: DIVERSITY <u>POLICY</u>*

<u>Trends</u>

Diversity is a policy level concern for employers and employees because it involves following not only good business practices but also adhering to legal requirements based on local, state, and federal laws and regulations.

Market and societal factors are shaping the workforce and the workplace and are driving conversations about diversity. One major factor is that employers are now operating in a world where employees are experiencing a splintering of identity. Workers as well as employers are discovering that workplaces, even those with a seemingly homogeneous labor force, are actually teeming with diversity. Employees are similarly finding themselves identifying with and/or being identified by an array of demographic and cultural characteristics:

- Religion
- Race, Ethnicity
- Native Born, Immigrant, $1^{st}$ Generation
- Age
- Marital Status (Single-Never Married, Divorced, Married, Widowed, $2^{nd}/3^{rd}$ etc. Married)
- Parents, Child-Free, Blended Family
- Geographic Location: Rural, Urban, Suburban; Region; Red State, Blue State
- Political Affiliation
- Educational Level
- Person with a disability, without a disability, family member of someone with a disability
- Caregiver, Non caregiver
- Sex
- Sexual Orientation
- Etc.

This splintering of identities means more employers are faced with engaging diverse peoples within the workforce and enabling their full participation. The expansion of the global market to include global workforces simply increases the complexity of diversity issues being faced by employers. These overtones can include an employer's need to ensure full participation for a person regardless of sex, race, ethnicity, disability, religion, sexual orientation, etc., understand the implications for work-life effectiveness for family members of people with disabilities and keep up with emerging categories of discrimination such as "family responsibility discrimination." Family responsibility discrimination is an emerging trend in workplace law that addresses discrimination against employees with care giving responsibilities such as parents or those caring for an ill or elderly relative. Caregivers do not have protected status, however, this group of employees may be disproportionately affected by sex-based discrimination or discrimination related to disability. In those cases, the EEOC has authority to enforce compliance with the ADA and Title VII, and provide those same protections to caregivers[40].

In response, some employers support the development of affinity groups, offer diversity trainings and deliberately engage in hiring practices that make their workforces resemble the communities in which they do business.

In a related manner, more populations of employees are advocating for equal opportunities in the workplace and are beginning to form collaborations. These collaborations are based upon the recognition that some solutions to increasing one group's participation in the workforce, such as flexible work options, can hold promise for other groups of workers.

In addressing issues of diversity in the workplace, government has already played a significant role. With the passage of the 1964 Civil Rights Act, which outlawed discrimination based on sex, race, color, religion or national origin in voting, employment, and public services—and the passage of the Equal Pay Act of 1970, which makes it unlawful for employers to discriminate on pay between men and women doing the same or similar work— government has already staked a claim in the conversation. As new policy is developed, however, to deal with the ever-changing definition of diversity, it is still critical to pause and ask: What is government's role in facilitating change? Do they follow the employer's lead, take the lead, or act in tandem?

Advocates working on behalf of people with disabilities, for example, in the last two decades have pushed for government to be a model employer in hiring and advancing people with disabilities. But ensuring diversity is

---

[40] "Unlawful Disparate Treatment of Workers with Caregiving Responsibilities." Equal Employment Opportunity Commission. 2005. <http://www.eeoc.gov/abouteeoc/meetings/5-23-07/index.html>

not a simple task that being a model employer can guarantee. A Summit participant explained that the EEOC is currently trying to understand why there has been a decline in the rate of employment for people with disabilities during that same two decades[41].

This is a question that has implications for an expanding pool of workers. The rate of disabled veterans is "going through the roof," explained another Summit attendee. "Employers have to anticipate that it is going to get worse. These (veterans) are men and women in their prime work years." Employers, advocates, and policymakers are going to have to ask themselves: What does it take to get them back into the civilian workforce?

Forecasting other potential areas where policy and practice on diversity may intersect, participants predicted an increasing potential for age discrimination as the Baby Boomer's, those born between 1946 and 1965, age and the potential targeting of older, more expensive employees for termination increases. Summit attendees also cited the increasing development of multi-jurisdiction employers, employers that have work sites in different governmental jurisdictions. Private employers encounter rules, regulations, and laws at the state and local levels as well as the federal that impact their ability to develop and implement inclusive workplace practices. When national employers have businesses in different states, they have to craft diversity and benefit programs that meet varying rules and regulations. This challenge is intensified when employers cross national borders and build international workplaces. Exploring what is a happy medium between ensuring fair and equitable workplaces for employees and allowing firms to maximize their profits is an important task for researchers, policymakers, employers, and workingwomen.

## Common Ground

There is an evolving and expanding conversation about what is "diversity." This new awareness of diversity and the role it can play in the workplace seems to be encouraging organizations to establish internal floors around diversity efforts that 1) eliminate discrimination and 2) create an adaptable work structure that enables the largest possible potential labor force to actively and productively participate in the workplace. In order to sustain this structure, workplace design that encourages diversity acknowledges and meets both the employer and employee's needs. What can be done to harness diversity as an engine for innovation and productivity seems to be an underlying theme of this conversation. The question being asked is how perceptions among employers and policymakers can be changed to allow diversity to be seen as a productive force rather than as a drag on the bottom line.

An example of the effort to change the workplace diversity paradigm emerges from the disability rights movement. Organizations within the movement are trying to transform doubt about those with disabilities into forward-facing questions: How can people with disabilities be enabled to work and to be as independent as possible in their community of choice while assuring them an acceptable living standard? This thought process is in direct contrast to the current one of: If people with disabilities "can't work" within the current structure of the workplace, what supports should society provide to enable their survival? This shift in focus enables diverse groups of people to work and offers a way of identifying implications for many categories of employees. When options are put in place that enable one set of workers to participate in a workplace, they can have the unintended consequence of helping other employees (i.e. flexible work schedules that enable disabled vets, caregivers, or maturing workers to stay on the job). Some categories of diversity cross race, age, or sex such as disability or care giving status. The workforce is changing, and diversity is a newly emerging, if unfamiliar, norm.

To establish common ground among employers and employees that enables the development of win-win public policy, it is important to understand what motivates different players. What often motivates companies is the bottom line. If public policies enable employers to attract and retain qualified employees or to maximize employee productivity, then they are more likely to support them. What would such "enabling" government policies or programs or public-private partnership look like? It is a question, in part, of how government can offer incentives for business to help them establish equitable practices: through establishing bidding rules for government contracts, acting as a model employer and taking the lead in establishing and measuring the impact of equitable work practices, by acting as an educator, by establishing and sharing definitions of equitable practices, as well as by

---

[41] Meyers, Linda. "Gap Widens Between Working Age People With and Without Disabilities." Cornell University. 2005. <www.news.cornell.edu/stories/Oct05/Disab.work.rpt.html > ; Also see: "Disability Discrimination." Equal Employment Opportunity Commission.< www.eeoc.gov> ; Also, see: Disability Statistics: Online Resource for U.S. Disability Statistics. Cornell University. <www.ilr.cornell.edu/edi/disabilitystatistics/>

helping employees and employers understand what their respective rights and responsibilities are under existing laws and regulations.

It is also extremely important when approaching policy development to understand more clearly that there is a significant difference in having a legislative or regulatory goal that is the elimination of discrimination rather than one that is the enabling of diversity. They require different tactics and incentives.

Enabling diversity can lead to unexpected avenues for policy development as policymakers look at such impasses to employee participation as lack of insurance. For example, older workers with pre-existing conditions may stay with current employers in their current positions rather than transition into a more desired phased retirement option, new career opportunity, or even self-employment because they are not guaranteed insurance in the new position or could not afford the costs of individual insurance.

Seeking common ground in enabling diversity has some interesting policy implications. When considering policy or regulatory development, policymakers need to know what types of supports can impact the greatest cross-section of employees and their employers. This means researchers and advocates must be able to observe which strategies for creating inclusive and nondiscriminatory workplaces are successful across most aspects of diversity and enable the greatest number of employees to be fully engaged in the workplace. Examples of strategies that hold the potential for enabling multiple cohorts of employees includes those that increase flexible work opportunities, ensure equitable pay scales related to objective requirements and responsibilities, or that support the development of mentoring initiatives and affinity groups in order to minimize or eliminate the isolation of marginalized groups of employees. Once strategies are identified, the next stage is to recognize what is an appropriate role for government in supporting their implementation.

Establishing the existence of a common ground between employers and employees is critical to the development of any sustainable policy or government program. Competitiveness and productivity are traits that both employees and employers want to build collectively within businesses and individually among employees. As an equal participant in developing common ground solutions to shared workplace challenges, government is not seen as simply playing a punitive or regulatory role, but as having the capacity to model, incentivize, educate, and enable diversity in workplaces. This expanded understanding of the role of government in problem-solving allows more opportunities for the development of public-private partnerships that allow all players more flexibility in developing sustainable workplace policies and programs.

Pragmatically, it is understood that there are cost-related implications to ensuring a diverse workplace and enabling a diverse labor force that have significant implications for policy, employees, and employers. Someone has to pay for such items as insurance for employees with pre-existing conditions or disabilities. Developing equitable distribution of the costs of these policy strategies will be an important piece in determining their eventual success in both adoption as legislation and implementation.

## Actionable Strategies

What is government's role in facilitating change? Do they follow the employer's lead, take the lead, or act in tandem? Government can play a role, ideally in partnership with employers and nonprofits, in modeling, incentivizing, educating about and enabling the development of diversity in workplaces, and maintaining its traditional role of regulation and enforcement. The strategies outlined below are culled both from real-world examples of policy development as well as the ideas of Summit participants.

Government can:
- Create mechanisms that allow local governments or organizations to provide reports on challenges and solutions up the chain to the state or federal level.
    - States such as California have hired consultants to look at the incidence of disabilities among their workforce and what types of disabilities that people have[42].
    - Kansas utilizes its state income tax form for a host of programs including ones that encourage employers to promote volunteering among their employees[43]. The public-private partnership brought

---

[42] California Disability Access Information. <www.disabilityaccessinfo.ca.gov/default.htm>
[43] Kansas Volunteer Commission. <www.kanserve.org/kvc/kvc.htm>; Also see: "Community Service Contributions Credit." Kansas Department of Revenue. 2007. <www.ksrevenue.org/taxcredits-community.htm> ; BPW staff were unable to locate

foundations together to work on the program. Program representatives went into neighborhoods and shared information at the grassroots level in the community. Public relations offices at companies then distributed information about the program to their employees.

- Incentivize employers to develop and implement diversity policies.
  - o Government can provide tax incentives for employers such as credits on lap tops for telecommuting employees.
  - o Government can exercise its spending power in its selection of vendors.
  - o Government can sponsor public relations campaigns; Spain, for example, campaigned to change the mindset towards women advancing in the work environment. The country launched a marketing effort that showed differences in workplace attitudes towards women in leadership within five years of its start[44].
- Provide research and education to employees and employers on rules, regulations, and their respective rights. This is one role that Summit participants felt government could play particularly well.
  - o Government can act as a role model. The communities of people with disabilities and the organizations that support them, for example, in the last two decades have pushed government as a model employer. The government has the capacity to model diverse practices such as in hiring practices[45].
  - o Government can track the involvement of diverse groups of employees in the workforce and has the power to research why and how changes in trends are occurring.
  - o Government can use the power of the bully pulpit to encourage dialogue and change. President George W. Bush's Freedom Initiative is aimed at ensuring all American's including those with disabilities have the opportunity to learn and develop skills and engage productively in the workplace[46]. This public outreach campaign is one example of how government can play a role in promoting diversity.
  - o Government can educate a broad spectrum of citizens. Veterans often don't know what benefits are available to them, but the government sponsors conferences to help provide that information; potentially similar conferences could be held for people in other diverse groups including employers.
  - o Government can engage in public-private partnerships that leverage the knowledge and resources of both sectors to meet a shared goal. For examples, Summit participants suggested a possible Department of Labor and/or Equal Employment Opportunity Commission "No Employee Left Behind" program that provides grants to employers that create diverse work environments.

---

specific references to this program. The above document references the State's volunteer program and tax credit program for businesses supporting community organizations.

[44] "Spain Presents 3rd and 4th Periodic Reports on Compliance with Women's Antidiscrimination Convention." United Nations. 1999. <www.un.org/news/press/docs/1999/19990617.wom.1138.html> ; BPW staff were unable to locate specific references to the public relations campaign. The above document relates Spain's overall progress on supporting women.

[45] Levin-Epstein, Jodie. Getting Punched: The Job and Family Clock. 2006. <www.clasp.org> ; Also see: Resources and Policy Changes Needed to Create Successful Workplaces. BPW Foundation. 2006. <www.bpwfoundation.org>

[46] Health and Human Services. <www.hhs.gov/newfreedom/init.html>

## *WORKPLACE EQUITY VOLUNTARY <u>PRACTICE</u> DISCUSSION*

Discussion Topic: What are the differing perspectives on ensuring workplace equity and what are the latest on outcomes for employers that strive to create equitable workplaces?

### *Speakers:*

- Lois Backon, Vice-President, Families and Work Institute
- Dr. Ellen Daniel, scientist, speaker, writer of *Every Other Thursday, Stories and Strategies From Successful Women Scientists*
- Lisa Hershman, Global Vice-President of Operational Excellence and Quality and first Chairwoman of Avnet's global Executive Women's Forum, Avnet, Inc. (FORTUNE 500 Company)

The synthesized version of the discussion which follows the abstracts is based on notes taken during the three table discussions on this topic as well as insights offered during informal discussions throughout the day. The summaries may or may not reflect the views of all of those who participated at a given table during the course of the day.

# *ABSTRACTS*

## *ABSTRACT A*

Families and Work Institute
*Transitioning into the 21st Century Workplace Presentation*
Prepared By: Lois Backon, Vice-President, Families and Work Institute

### Section 1: Overview of Topic/Research

The workforce is changing:
- It is more ethnically diverse.
- It has aged.
- Women are an increasingly vital part of the workforce.

The workplace is changing:
- We live in a 24-7 global economy and the work hours have increased
- Technologies—such as voicemail, email, and beepers—are blurring the lines between when people are at work and when they're not.
- Overwork in America is prevalent.
- There is increasing job mobility and insecurity.

Family life is changing:
- There is an increase in dual-earner couples.
- The division of household chores is changing.
- Fathers are spending more time caring for their children.

This is not your father's (or mother's) workforce. We are transitioning from the workforce and workplace of the 20th century to the workforce and workplace of the 21st century. Two competing trends are at work: an increase in the demands on employees, and an increase in employee's focus on family and/or personal lives.

### Section 2: Clarify implications for employers, stressing any return on investment implications

Today in the U.S.:
- 39% of employees are not fully engaged in their jobs
- 54% are less than fully satisfied with their jobs
- 38% are somewhat or very likely to make a concerted effort to find a new job in the coming year
- 33% are exhibiting one or more symptoms of clinical depression

Families and Work Institute has identified workplace flexibility as one of 6 research-based criteria for an effective workplace:
- Providing job autonomy
- Creating learning opportunities and challenges on the job — where employees can grow, learn, and advance
- Developing environments where supervisors support employees in being successful on the job
- Developing environments where coworkers support each other for job success
- Involving employees in management decision-making
- Creating flexible workplaces

*What is the business impact of providing workplace flexibility?*

mployees with more access to flexible work arrangements are more engaged in their jobs, committed to their current employers, and are willing to work harder than required to help their employers succeed. In organizations with high levels of workplace flexibility, employees are more:

- Engaged: 66% of employees report high levels of job engagement and commitment in organizations with high levels of workplace flexibility, versus 56% in organizations with low levels of flexibility.
- Satisfied with their jobs: 67% of employees report high levels of job satisfaction in organizations with high levels of workplace flexibility, versus 23% in organizations with low levels of flexibility.
- Stay with their employers: 72% of employees plan to remain with their employers for the next year in organizations with high levels of workplace flexibility, versus 49% of organizations with low levels of flexibility.
- Have good mental health: 35% of employee's exhibit high levels of mental health in organizations with high levels of workplace flexibility, versus 19% in organizations with low levels of flexibility.

**Section 3: Clarify implications, if applicable, for employees/workingwomen or policymakers**

- The workforce is becoming more family focused, particularly among Gen-X and Y workers.
- The way employees work today is affecting their ambition. Among college-educated women, in 1992- 57% wanted to move into jobs with more responsibility. In 2002 -36% wanted to move into jobs with more responsibility; a decline of 21%.
- Women have achieved higher educational levels than men: 31% of women have 4 years of college or more versus 27% of men
- Women are more likely to be managers and professionals than men: 38% versus 28%
- Women's annual earnings are still significantly less than men's by about $12,000
- Women are more likely than men to have part-time positions
- Women are significantly less likely than men to hold *clout* titles including CEO, Chair, Vice Chair, President, COO, SVP, EVP. In 2005, in Fortune 500 companies, only 9.4% of the clout titles were held by women.
- Employed mothers are still working a second shift:
- 77% of women in dual-earner couples with children take greater responsibility for cooking.
- 78% take greater responsibility for cleaning.
- 70% take greater responsibility for everyday child care.
- In 1977, 78% of mothers claimed greater responsibility for taking time off of work to stay home or do something with children. In 2002, 72% of mothers claimed greater responsibility.

**Section 4: What roles can or have researchers, policymakers, employers or employees played in this area/topic?**

The role of research has been to inform decision-making and shape the national dialogue around this mismatch and the media's portrayal so that it is no longer seen as an "individual problem" but a larger social issue with larger solutions. Employers are finding new ways of making work "work" for business and employees. Workplace flexibility is a critical ingredient in creating flexible workplaces. It can be a strategic no- or low-cost business tool to address the mismatches between the needs of employers and employees and to create the workplace of the 21st century. There are still a number of issues around flexibility:

- 37% of employees say it is hard to take time off during work when personal or family issues arise
- 39% of employees report that using flexibility jeopardizes their advancement
- 54% of employed parents say they can't take time off for sick children without losing pay, using vacation days, or making up an excuse

But we are seeing a change. Families and Work Institute data shows that employers are maintaining or increasing their commitment to flexible time policies. Flexibility is increasingly <u>not</u> seen as a perk for employees, but as a strategic business tool to make work "work" for employers and employees.

**Section 5: Discussion Starter Questions**

- What does workplace equity mean?
- Is workplace equity a women's issue?
- Should employers create specific programs or policies to enhance workplace equity?
- What programs, policies or culture practices enhance workplace equity?
- Do workplace equity programs, policies, or practices have an affect on ROI?
- Does media coverage affect the perception of workplace equity issues? If so, how?
- Will Generation X and Y's values and perceptions on work and family begin to close the gender gap on workplace equity issues?

## *ABSTRACT B*

*Every Other Thursday: Stories and Strategies From Successful Women Scientists*
Prepared By: Dr. Ellen Daniell, scientist, speaker, writer of *Every Other Thursday, Stories and Strategies From Successful Women Scientists*

### Section 1: Overview of Topic/Research

I have been a member of a professional problem-solving group, composed of women scientists, for almost thirty years. During those years, I have been variously a university faculty member, a businesswoman in biotechnology, and a writer and consultant. My book "Every Other Thursday: Stories and Strategies from Successful Women Scientists" describes how this group works and details a number of the recurring themes in our work. My focus is to encourage people to form groups around areas of professional interest and challenge.

Groups may be especially useful for those women or men who feel themselves isolated or marginalized, but I recommend them just as emphatically to anyone who is enthusiastic about discussing and working through issues with others. A group may provide a place to practice skills such as determining and asking for exactly what you need/want to do your job.

In writing the book, and in discussions with women in academia and business I have learned that many of the stereotypes and perceptions that were prevalent thirty years ago persist and still hamper the full participation of women in many professions. Changing those perceptions must be a major part of efforts on behalf of women. Solutions devised by a group may not only help the individual survive and prosper, but also enrich (and gradually alter) the workplace environment.

### Section 2: Clarify implications for employers, stressing any return on investment implications

- Women are often particularly effective in communication and support. We must believe and demonstrate that intimacy and reliance on others for encouragement and advice is a source of empowerment not a sign of weakness.
- Changes in the workplace and in measures of success that increase flexibility should not be viewed as "accommodations for women with families." These changes are generally also positive for men (or employees of either sex with our without families). Flexibility encourages creativity and fresh thinking.
- We may need to consider our perceptions of what constitutes a successful career. Productivity should not be confused with single-minded fanaticism nor with hours worked. We need to focus on results, not window-dressing.
- Women are discouraged from entering certain careers because of subtle (or not-so-subtle) discrimination. These professions suffer from the loss of available talent, and possibly loss of unique and fresh approaches to the issues of the profession. Peer support and counseling may provide an antidote to the feelings of isolation that result from entering a field with a distinct gender imbalance.

### Section 3: Discussion starter questions

- Can you think of a time or specific event in your career when you would have benefited from describing a workplace issue, in confidence, to a group of people who were not involved in the outcome, but might have relevant insights and experiences?
- If you wanted to establish a professional problem-solving group, do you envision finding members within your own organization, or would you want to make contact with people outside your organization but who would understand your issues? Think of some advantages and disadvantages of the two approaches.
- As an employer, do you see problems with having a group of coworkers discussing their personal professional challenges in a forum that did not necessarily pass those concerns up the "chain of responsibility"?

- As an employer, does it make sense for you to <u>encourage</u> the formation of such peer-counseling or problem-solving groups within the organization? For employees—would it feel either more or less empowering if your employer facilitated the formation of the group?

## *Discussion Synthesis: WORKPLACE EQUITY VOLUNTARY <u>PRACTICE</u>*

<u>Trends</u>

Equitable workplaces offer equal opportunities for advancement, professional development, and wages as well as unbiased measures of performance and worth for all employees.

For the purposes of the 2006 National Employer Summit, workplace equity discussions focused primarily on workplace and societal barriers that undermine the ability of workingwomen to participate fully and equitably in the workplace. Participants noted, however, that while issues of equity and the biases that can undercut workplace equity are keenly felt by workingwomen , they are also felt by all employees with family responsibilities, employees with disabilities, or other diverse or minority employees.

To some Summit participants, it appears that the use of "discouraging" speech continues and terms such as "doing women a favor" continue to hamper workplace equity efforts. A bias against women and/or those with family responsibilities has caused motherhood to be termed the "baby gamble." Caregivers, in general, are learning to cope with something now being called family responsibilities discrimination, which is discrimination against employees based on their responsibilities as caregivers[47]. As stereotypes linger about women's commitment to their jobs, participants noted that they continue to hamper women's full and equitable participation in the workplace. Complementary stereotypes about the "appropriate" role of men in care giving are also hampering the ability of male workers to access family leave and other benefits often provided to their female counterparts.

The workforce is changing to include more ethnicities, age groups, and women giving workplace equity issues resonance among many different types of workers. Both, workingwomen and men live in a 24-7 global economy and their work hours have increased. Women's average annual work hours were up by 15 percent between 1976 and 1993 and men's by 3 percent.[48] Technologies—such as voicemail, e-mail, and beepers—are blurring the lines between when people are at work and when they're not. Additionally, it seems that overwork, job mobility, and insecurity are prevalent in the U.S. The resulting workplace stress is taking a toll on workers. One U.S. employer found that 19 percent of its male workers and 15 percent of its female employees suffered from major depression[49]. Twenty-eight percent of employees in another study reported feeling "overworked" often or very often within the prior three months, reported the Families and Work Institute in 2001[50].

This is not your parents' workforce. Family life is changing, and this is shown by an increase in dual-earner couples—nearly 70 percent of children under the age of 18 have either both parents or their only resident parent in the workforce[51]. Divisions in care giving responsibilities are shifting and fathers are more likely to be significantly involved in caring for their children. An increase in working grandparents raising young grandchildren is also on the rise. The United States is transitioning from between the workforce and workplace of the 20th century to that of the 21st century. Two competing trends are at work in this transition—the increased demands on employees and the increased focus by many employees on family responsibilities and personal goals.

Future progress in workplace equity appears to be less about focusing on characteristics of individual workers and more dependent upon:

---

[47] "Model Policy for Employers." WorkLifeLaw. <www.uchastings.edu/site_files/WLL/modelpolicyforemployers.pdf>
[48] <u>Bureau of Labor Statistics.</u> <www.bls.gov/opub/ils/pdf/opbils10.pdf>
[49] Sederer, Lloyd, M.D., and Norman A. Clemens. "Economic Grand Rounds: The Business Case for High-Quality Mental Health Care." American Psychiatric Association-Psychiatric Services Online. 2000. <http://psychservices.psychiatryonline.org/cgi/content/full/53/2/143.>These were not the actual statistics reference in the discussion which referenced the percentage of employees who reported feeling mentally healthy. BPW staff synthesizing the discussion summary was unable to locate this specific statistic. However, the statistics provided support the overall flow and intent of the discussion.
[50] Galinsky, Ellen; Stacy S. Kim, James T. Bond. "Feeling Overworked: When Work Becomes Too Much." Families and Work Institute. 2001. <www.familiesandwork.org> ; BPW staff synthesizing the discussion summary was unable to locate this specific statistic. However, the statistics provided support the overall flow and intent of the discussion.
[51] "Poverty and Income: Financial Support and Parental Employment." U.S. Department of Health and Human Services. 2002. <http://aspe.hhs.gov/hsp/02trends/ES3/pdf>

- Removing concepts of favoritism or accommodation from work design options and refocusing measures of productivity on results rather than on time spent in the physical office
- Reducing the negative aspects to isolation (for example being only one of the few women working in a field, institution, or department) by offering peer counseling, mentoring, or membership in affinity networks.
- Creating a culture of acceptance that offers employees support against bias.

Workplace flexibility is one tool that proponents feel can help achieve workplace equity. Flexibility initiatives redesign the workplace by compelling employers to focus on how work gets done and the resulting changes in productivity rather than on requiring employees to make themselves available at specific points in the workplace. Some flexible workplace proponents feel that results-based measures help focus employers on getting work done rather than on the personal characteristics of the person doing the work, and therefore they embrace less biased measures for determining career mobility or pay which can benefit workingwomen, people with disabilities, maturing workers, etc.

A shift in the work paradigm related to flexibility is occurring on some levels because technology makes it possible for more workers to work from home, for example. But proponents also observe that the efficacy, equity, or desirability of this practice depends upon where one is within labor and management and within one's career. While workers with family responsibilities or other outside obligations may view the ability to blend life and work more closely as desirable, there are some workers—often in younger age groups—who want a clearer delineation between work and life.

Yet other conversations held at the Summit contended that there is also evidence that younger workers are actually driving conversations around work-life in many workplaces because they are perceived as "working to live and not living to work." They are pushing employers to offer flexible options to a broader array of employees—for example, to those who may want to pursue educational or life goals not related to specific care giving roles.

Interesting questions arose out of the overall discussions that could not be addressed within the scope of the day's activities but that bear further consideration: Is workplace equity or flexibility a right, a privilege, or an earned benefit? Is it an accommodation or simply a tool for reshaping work design and productivity? Under what circumstances can it be viewed as a right—such as offering paid sick leave—and at what point does it become an earned benefit based upon performance—telecommuting?

Broader societal changes will finally drive the changes in the structure of work and will ultimately remove the final barriers to equity. Some of these changes include:

- Changing measurements of work to those based on done to results instead of hours worked at a specific business location
- Realization by "corporate America" that it needs to have a way to bring back highly-skilled women who off-ramp
- Removing the mindset that if working at home is not working

## Common Ground

The anticipated shift in the work paradigm from measuring face-time as an indicator of productivity to measuring work accomplished is more prognostication than fact. The 2005 Annual Benefits Survey of the Society for Human Resource Management revealed that only 19 percent of companies offer job sharing, 33 percent compressed work weeks, 56 percent flex time, and 37 percent telecommuting [52]. While proponents espouse workplace flexibility as an effective tool for designing more equitable workplaces, the real and ongoing trend is that most workplaces do not offer formal workplace flexibility programs or policies. Several reasons exist for this lack of broad-based adoption. First, managers may feel that flexible work options constrain their ability to manage the workforce. Managers are responsible for meeting production goals, and flexibility can present another layer of administration that adds more to their workload than it offsets in increased production and employee engagement. Secondly, employees are often reluctant to make use of flexible programs when they are offered because they fear a potential backlash. The latter reason indicates that creating a culture of flexibility is much more complex than simply offering a program. It involves a demonstration of commitment throughout the organization including the modeling of workplace flexibility by senior leadership and examples of advancement by employees who have

---

[52] "Annual Benefits Survey." Society for Human Resource Management. 2005. <www.shrm.org>

utilized the programs. There is an aspect of bias avoidance in the case of workplace equity. It is reflected in the fear of asking for something special because workers don't want a bias to emerge against them. This, say proponents of workplace equity, makes it not only a woman's issue but a workforce issue because it is something that impacts a broad range of employees from entry-level workers, to people with disabilities, to those in well-delineated advancement tracks, to lower-wage workers, and so on.

As more employers are asked by employees to adopt flexible-work programs, it becomes clear that there is often a narrow understanding of flexibility which can stymie its progress. Flexibility is often thought of as being different permutations of very structured part-time schedules. In reality, flexibility can exist within a broad spectrum of options ranging from the basic ability to address intermittent needs for time off, to flexible start and end times, and on into more structured arrangements such as job-sharing or part-time career paths[53].

Flexibility is a work design tool that can support more equitable workplaces—but it is only a tool. How measures be substantiated in a way that satisfies both employers and employees? Measuring productivity within flexible work environments is not without precedent. Examples, such as retailer Best Buy's adoption of a results only work environment, exist for measuring productivity based on merit; these measurements focus on business outcomes and, by their nature, both subtly and overtly support flexibility[54].

An interesting spin on the workplace equity issued emerged as discussions progressed. Equity, from both a business and employee perspective, is not only about offering programs and policies that provide equitable opportunities for all employees related to advancement, wages, work design options, etc, but also involves offering any benefits or work design options (such as flexible workplaces) in ways that are equitable for all employees.

Expectations about work availability, for example, can trump policies and procedures. Executive or professional staff may feel pressed to be available 24/7 because of the availability of technologies that allow them to access e-mail, phone, and computers from off-site. In this instance, employees with more structured work schedules and definite in and out times may have an easier time turning off the switch when they leave the workplace. Some employers are dealing with these types of equity issues by harnessing technology in benign ways and encouraging innovation in scheduling. For example, some employers set up e-mail alerts that automatically turn on for all employees after the end of the official business day. These e-mails alert recipients that the business is officially closed for the day and that their e-mail will be responded to the next business day. Others ensure that all employees make full use of holiday times by shutting down offices for an entire holiday period, such as the last week of the year before the Western New Year's Day.

Getting a handle on the current state of workplace equity varies based on the criterion examined: age, work-type, sex, parental status. Because issues of equity can be difficult to assess in today's workplaces where employees' demographic characteristics merge and alter over-time, equity has a long way to go before it is placed at the top of the business agenda. Witnessing the effects of inequity in research studies will not be enough to persuade executives to change their workplace cultures. It will require experiencing the effects of inequity on productivity and the loss of highly-skilled workers to more supportive work environments … that is most likely to fuel changes.

A crucial step in the creation of equitable workplaces, say proponents, is having support among upper management especially among senior-level males[55]. Anecdotal evidence seems to support the idea that men are often "converted" to supporting initiatives to achieve workplace equity when they have professional daughters. Generational differences also play a role in how likely equity issues are to remain on the business agenda. Millennial's, the generation coming of age at the start of the 21st Century, often do not think inequity remains in the workplace. This is because, say Summit discussants, the glass ceiling becomes more apparent to women in later stages of their career

---

[53] "Workplace Flexibility: Definition." Workplace Flexibility 2010. < http://www.law.georgetown.edu/workplaceflexibility2010/definition/index.cfm>

[54] Gans, Stefanie. "Flexing Your Workplace Muscles." Business Woman Magazine. 2007. <www.bpwusa.org>; Also see: Jodie Levin-Epstein. "Responsive Workplaces; the business case for employment that values families. MotherLoad ,a special report in the American Prospect. 2007. <www.clasp.org>

[55] Gans, Stefanie. "Mentoring: A Workplace Best Practice." BusinessWoman Magazine. 2007. <www.businesswomanmagazine.org>

## Actionable Strategies

Actionable strategies in this realm focused on examples of current initiatives that fueled organizational or societal change. Societal changes are targeted as the key to creating real change. "If we just keep working on shifting policies, it won't be enough. We have to stop devaluing family care," stated a participant.

An ongoing change project being funded by the Alfred P. Sloan Foundation called the Business Opportunities for Leadership Diversity (BOLD) Initiative supports a team-based approach to designing flexible work options that supports both employees' needs for supportive work environments and employers' needs for a productive workforce. Demonstration projects already conducted by the BOLD Initiative indicate those employers that allow working teams to schedule their own time showed an increase in productivity levels[56].

Business imperatives are driving some workplace changes, although the word is out on whether they can create sustainable change. For example, some companies are addressing knowledge and experience gaps in their organizations by bringing back retired staff and meeting their needs for more flexible work schedules[57].

Cultural change can also occur by creating new connections among employees that break down walls between departments as well as individual employees. Creating affinity groups inside and outside the workplace reduces the sense of marginalization and isolation that can be felt by women (or others). These affinity groups provide a place to practice skills, to learn to ask for exactly what they want and need on the job, and to find mentors as well as to mentor others. Peer-counseling or peer-mentoring across genders is a key strategy for building a personal network that helps equalize access to valued positions and experiences. Women's networks—as well as other affinity groups—teach participants to be proactive in seeking mentors above them and across departments as well as how to be mentors[58]. Selecting both male and female mentors and mentees is critical to breaking down barriers, gaining insights into the workplace, and learning how different people navigate the workplace[59]. While this solution to marginalization is being adopted by an increasing number of larger workplaces, tracking the return on investment for employers is a relatively new area of research. Current assumptions based on this strategy are that affinity groups will encourage and sustain more candidates in the succession pipeline, strengthen leadership skills, and streamline communications among different departments or divisions.

As flexibility advances as a strategy to equalize opportunities within companies, the need to move the justification for flexibility away from personal needs or characteristics becomes increasingly important. Employers, such as The New York Times, do not ask employees to disclose their reasons for requesting flexible schedules. This reason-neutral practice removes the burden (and potential liability) from employers for deciding which personal reasons are more worthy than others of flex-options. This prevents employees from revealing personal information that may inadvertently trigger bias. Shifts in workplace consciousness such as this help transfer workplace flexibility out of the benefit package and into the employer's tool kit. Under those circumstances in which employers do require an employee to offer a reason for needing flex-time, some Summit discussants suggested that workingwomen learn from their male counterparts who are more likely to talk about using leave time for professional development or educational opportunities rather than for needing time off to be with the family.

Conscious efforts are encouraged to harness technology to support workplace strategies aimed at creating equitable and flexible work environments rather than allowing emerging technologies to haphazardly drive workplace change. Some strategies being used by employers to support flexible workplaces include specially designed software that allows shift workers to mark times in and times out throughout the day versus start and end times, using internet technology to allow employees to create team schedules or swap schedules, and telecommuting[60].

Research will play a significant role determining the future availability of flexibility. Ideas for future research included:

---

[56] BOLD Initiative.<http://www.sloan.org/report/2004/workplace.shtml>

[57] Hutchens, Robert. "Phased Retirement: Problems and Prospects." Center for Retirement Research at Boston College. 2007. <www.bc.edu/crr/>

[58] Hollis, Robin. "Women's Networks: A Primer." Audio conference summary. Business and Professional Women's Foundation. 2006. < http://www.bpwusa.org/i4a/pages/index.cfm?pageid=5066>; Also see: "Women's Network: A Promising Practice in Diversity."BusinessWoman Magazine. 2007. www.businesswomanmagazine.org.

[59] "On Target: Nancy Jackson." BusinessWoman Magazine. 2007. <www.businesswomanmagazine.org>

[60] Workplace Flexibility for Lower Wage Workers.  Corporate Voices for Working Families. 2006. <www.cvwf.org>

- Capturing effective employer practices among those who have equalized the availability of benefit options for all employees
- Gathering data on how employers in different sectors may experience different constraints on their ability to offer flexibility such as government employers versus private employers or large employers versus small employers
- Learning how small employers deal with a 24/7 marketplace and how that affects work-life options for all employees
- Answering the tough questions about the impacts of workplace flexibility on employees such as how does workplace flexibility affect the traditional career trajectories of workingwomen and men—How is it reflected in different fields?
- Uncovering what environmental factors influence the availability and use of flexible workplaces … such as exploring if FORTUNE 500 Companies with female CEOS have different/better/worse policies than those without

## *Workplace Equity <u>Policy</u> Discussion*

Discussion Topic: What is government's role in supporting workplace equity efforts for workingwomen, in theory and in practice? What does this mean for employers and the workplace?

### *Speakers:*

- Heather Boushey, Senior Economist, Center for Economic and Policy Research
- Shirley Clark, Founding Partner, Choose 2 Lead Women's Foundation
- Judith Finer-Freedman, Founder, WorkLife Juggle

The synthesized version of the discussion which follows the abstracts is based on notes taken during the three table discussions on this topic as well as insights offered during informal discussions throughout the day. The summaries may or may not reflect the views of all of those who participated at a given table during the course of the day.

# *ABSTRACTS*

## *ABSTRACT A*

Choose 2 Lead Women's Foundation
*Workplace Equity and Inequity Presentation*
Prepared By: Shirley Clark, Director and Co-Founding Partner, Choose 2 Lead Women's Foundation

### Section 1: Overview of Topic/Research

The saying goes "it's not what you know, but who you know." Workplace research has shown this to be the case in organizations around the country. So how does a workplace even begin to achieve equity when many decisions and promotions are not based on merit? In an ideal workplace no opportunity would deny an employee based on anything other than ability. The diversity of the workforce and their many individual requirements add complications to an issue that is already wrought with challenge. We will explore at this table what role government can or has played in supporting workplace equity efforts.

While the wage gap is the most-often-discussed statistic, this forum will take a brief look at various forms of workplace equity and inequity. While part-time workers, contractors, and sub-contractors all have concerns, in our session we will concentrate on issues most relevant to women's career advancement.

It is also important that we understand what lies behind the statistics, how the economic aspects and implications factor in and how cultural differences – gender, ethnicity and tradition play a role. The discussion on workplace equity will focus on three critical areas: the causes of discrimination in the workplace; what should be done about it; and what is currently being done about it.

### Section 2: Clarify implications for employers, stressing any return on investment implications

Studies have shown the association between retaining or bringing back experienced, career-minded individuals and positive bottom-line results (100 Best from *FORTUNE's* list outperformed S&P 100 in 2005: 14.75% to 4.81% ROI – Great Place to Work Institute). Conversely research has shown that dissatisfaction with the job and the workplace environment (HBR study, C2L research) is a major factor in an employees' employment decision process. The causes of workplace dissatisfaction are often the same issues that create potential inequity within the workplace.

Employers need to be concerned about these practices to ensure they are optimizing their human resources investment dollars:
- Leadership style(s) and resulting workplace culture
- Tolerance for any form of discrimination – including marginalization for using flexible offerings
- Promotions not rewarded on merit, or criteria not well-defined
- Disregard for employees working non-traditional schedule
- History/Tradition – looking at the workforce through the eyes of a 1960's manager
- Lack of options and/or opportunities for those requiring family time
- One-size-fits-all positions
- Jobs for less-than-full-time don't exist or limit upward mobility
- Poor management training

Employers would do well to understand the correlation between workplace equity and retention figures. Additional to hiring and training costs, losing experienced talent can translate into lost opportunity.

### Section 3: Clarify implications, if applicable, for employees/workingwomen or policymakers

- Women often leave the workplace because they cannot find a job that suits their needs. The workplace has not kept up with the changing demographics of the last 40 years and still caters to a dual-parent, single-earner model. Even if an employer pays men and women equally when they get out of school, circumstances for women often dictate career interruptions that throw them behind the earning curve, off the promotion ladder or

even out of the game. Women don't even need to leave the workforce to begin to fall behind if the only upward options available to them require more of a "non-controlled" time commitment than they can provide.

- These tough decisions and time away from work can cause substantial implications to a woman's life-long earning power (HBR stats, other) as well as challenges for upward mobility. Unless positions are created to ensure that their intellect and experienced is capitalized upon, they will often choose to work in more meaningful positions - sometimes in the non-profit sector (almost always less money) or smaller companies where they have more control (less money and/or benefits). In any of these choices, women:
  - Lose short-term earnings
  - Lose long-term earning power
  - Lose opportunity to attain position of greater influence
  - Effect their life-long financial stability

**Section 4: What roles can or have researchers, policymakers, employers or employees played in this area/topic?**

- As we strive for equity in the workplace, it is important to understand the issues, the statistics and how we each can play a role in moving this agenda forward.
- Policymakers cannot write legislation that can change the daily management of organizations throughout the country. However, that does not mean there is not a legislative role. There must be caution exerted when attempting to legislate oversight because budgetary issues and implementation uncertainties may delay or eliminate the desired effect.
- A collaborative effort between business, legislatures and employees must occur. Researchers can provide valuable data and statistics, and can help establish on-going metrics to ensure comparative measurements are presenting a full and accurate story so that policymakers and organizational leaders can determine specific points of action to improve the situation. Long-term non-partisan objectives should be firmly established on a national basis.

**Section 5: Discussion Starter Questions**

- What specific issues or concerns come to mind when you hear "workplace equity"?
- Where are the areas of greatest concern when you think about government engagement in supporting workplace equity? Why?
- Is it idealistic to think that everyone in the workplace can participate equitably?
- How much has been achieved? Where does it need to go?
- What barriers exist to greater equity? What are some of the causes of inequity?
- What is required to move forward (from employers, workingwomen, government)?
- What are the short-term implications of inequity? To employers? To employees?
- What are the long-term implications?
- Do you believe inequity has an affect on U.S. competitiveness? If so, how? If not, why not?

## *DISCUSSION SYNTHESIS: WORKPLACE EQUITY <u>POLICY</u>*

**<u>Trends</u>**

"The causes of workplace dissatisfaction are often the same issues that create potential inequity in the workplace," reported one participant.

Is creating workplace equity something better achieved through market-driven solutions or government supported options? What are the combined and separate roles for government and private industry? When discussing public policy and workplace equity, these questions underlie most conflicts that arise during debates about how to address inequities in the workplace. Understanding the ideologies that shape the decision-making processes of employers, policymakers, and their constituents is a critical step in developing win-win voluntary or public-policy solutions.

This leads to the question when discussing workplace flexibility: Is it a right, a privilege, a benefit, a workplace tool, or a combination of all of the above? This seems to be a critical question needing an answer as possible policy solutions for supporting equity and flexibility are debated including expanded paid sick leave, paid family medical leave, and a right-to-ask for flexibility.

If all types of flexibility are to be equally available to all workers regardless of output, it can threaten the ability of employers to design workplaces that maximize profits or achieve organization missions. Still, are there some types of "flexibility" on the spectrum of flexible work options that should be acknowledged within the 21st Century as a right or at least as a necessity for all workers such as paid sick leave?

Limits on employer discretion in offering flexible work options can create an all or nothing feeling to offering such options for employers.

In larger organizations, discussants felt that inequity often is felt in the hiring and career mobility options of women:

- The need to enter and exit the workforce throughout her career is one of the greatest inhibitors to a woman's career mobility. Women who off-ramp or periodically exit out of the labor force even for a short-time are perceived as experiencing a nearly irretrievable loss of skills and networks[61].
- The lack of portability in key workplace benefits such as insurance reduces caregivers' ability to move between jobs as well as undercuts their ability to negotiate within the workplace.

Other aspects of equity deal with designing work so that it meets 21st Century employees where they are. How work gets done and the supports that are available to aid employees in getting work done often still cater to a dual-parent, single-earner family model for employees[62]. Today's workplaces have not come to terms with the changing realities of the American family and the lives experienced by their employees. This is reflected in the design of schedules, the allocation of work assignments, available benefits, hiring, and advancement practices that favor employees who can be available during traditional work hours or that can be on call 24-7. By maintaining old assumptions, employers are unintentionally creating workplaces that are structurally inequitable even if the stated intent of management is to be equitable. When modern workers do not fit into workplace structures built to maximize the capacity of 1950s workers (workers with at-home spouses, etc.), dissonance occurs.

Employees, including workingwomen, who do not fit into this stylized structure, often face real challenges within workplaces. To ensure access to highly skilled and experienced workers at all levels and in all industries, employers are faced with redesigning work to open the workplace to a larger work force and tap into all available resources. The economic implications for having a fully-engaged and productive workforce as the century advances will have a profound impact on everyone involved. This reality alone requires the attention of policymakers, if not their action.

---

[61] <u>The Hidden Brain Drain.</u> Harvard Business Review Research Report. 2005. < http://harvardbusinessonline.hbsp.harvard.edu>

[62] Boushey, Heather. Equal Employment Opportunity Commission Hearing. Written testimony. Center for Economic and Policy Research. April 17, 2007. <http://www.eeoc.gov/abouteeoc/meetings/4-17-07/index.html>

Solutions to removing the structural and cultural barriers that stall women's full and equitable participation in the workplace necessitates the collaboration of policymakers, employers, and workingwomen and requires a combination of public policy and voluntary practice-based solutions.

This issue is significant because workplace biases against women continue to stymie their ability to obtain workplace positions that allow them to acquire the needed leadership experience, networks, and visibility to maximize career mobility. Inequity affects both short and long-term earnings and eventually it is reflected in a poverty rate which is higher for elderly women than for men[63].

The type of work assignments allotted to employees can go a long way to establishing equitable opportunities for advancement and wage equity. Prior to the 2005 National Employer Summit, a survey of Summit registrants revealed that even among these early adopters of forward-thinking workplace policies, the majority reported that women in their companies were more likely to be in "soft" positions such as communications or human resources which did not have easy ways to measure their departments' impact on the bottom-line rather than "hard" or operational positions that have clear bottom-line implications and are more often associated with upward mobility.

Bias plays other subtle and unsubtle roles in women's career mobility. If a woman doesn't conform to the traditional workplace (read male-focused) model, it shows up in performance reviews. Dress codes are one example of how this bias plays out. A woman dressing casually may find this factor playing against her during a performance review. Winning acceptance for bias training can be challenging but may be a necessary tool in developing equitable workplaces. Both government and private industry studies that reviewed their organization's performance appraisal practices found that hidden biases often crept in to the process and that few standards existed to help supervisors apply workplace standards equitably[64].

Inequity that impacts workingwomen is not simply something that affects women versus men. Women often have to stay in the workplace past 65, which individually impacts pension and social security. Because women (and often men) have to stay in the workplace longer to offset smaller retirement savings, it is affecting the availability of opportunities for younger workers. In the last economic recovery, older workers took almost all the new jobs[65]. So there is a tension between the large, new generation and the semi-retired boomers.

"If there was more open thinking, you'd have a bigger workforce that taps all resources," said one Summit participant.

There is an increasing sense that the days of gleaning the workforce for employees who best fit the standardized workplace design is gone even if the mindset that perpetuates that work design isn't. But a critical question when dealing with public policy is: Can changing cultural bias be legislated?

To ensure access to highly skilled and experienced workers at all levels in the 21st Century workplace, discussants predicted that employers would need to redesign work in order to open up workplaces to a more inclusive workforce. Public policy can help employers address this need by supporting initiatives that can level the playing field for employers while this transition is taking place.

For example, policy can help meet the needs of employees and employers where they are by:

- Offering more portability in critical benefits such as health insurance: expanding access to medical insurance in a way that takes some of the burden off of employers and allowing employees greater portability with less risk of loss of benefits across the lifespan.
- Providing employees with tools to address the realities of more subtle forms of discrimination which can show up, for example, in types of work assignments, and providing employers greater guidance in the responsibilities and rights under current legislation.

---

[63] Women's Institute for a Secure Retirement. <http://www.wiser.heinz.org/portal/>
[64] Hewlit, Sylvia Ann; Carolyn Buck Luce, Cornel West. "Leadership in Your Midst: Tapping the Hidden Strengths of Minority Executives." Harvard Business Review. 2005.; Also see: Press Release. Center for WorkLife Policy. <http://www.worklifepolicy.org/documents/Hidden%20Bias%20Press%20Release.pdf>
[65] Boushey, Heather. "Gender Bias in the Current Economic Recovery: Declining Employment Rates for Women in the 21st Century." Center for Economic and Policy Research. <www.cepr.org>

## Common Ground

"The causes of workplace dissatisfaction are often the same issues that create potential inequity within the workplace," explained a Summit participant. Workplace equity generally relates to providing equal pay and advancement opportunities for workingwomen and minorities.

A national trend in policy, say discussants, is to downplay family life issues even though polls show that the American public cares about these issues[66]. It appears that national leaders rarely translate these issues (i.e. insurance, workplace equity, work-life balance) into legislation, and reporters don't report on it because it is not compelling enough.

The continued valuing of employee face-time over the results generated by work is a disincentive for the spread of flexible work options. Workplace flexibility, say proponents, is a workplace design tool that holds the potential to open up the workplace to many different employee-groups (i.e. maturing workers, entry-level, caregivers, people with disabilities) and thereby expands the available labor pool for employers. Still, managers are struggling to manage alternative work styles. Support for managers through training programs within employers and in business schools on how to manage employees in a flexible work environment are critical to breaking down barriers and supporting managers.

Driving change around equitable workplaces and providing flexible work options that can empower more equitable practices requires a better understanding of the full spectrum of flexibility that is desired. For example, workers are not necessarily expecting that more part-time options are made available, per se, but would welcome even having the flexibility to come in an hour earlier or later and to adjust their schedule accordingly. Still, proactive workplaces will design their workplaces to meet the needs of the demographically altering labor force and an increasing number of workers—such as those nearing retirement will desire richer part-time opportunities that provide some kind of benefit parity with full-time work. It is also critical that advocates expand people's understanding that in some cases, the "part-time" that someone is negotiating for may be a 50-hour work week rather than an 80-hour one.

## Actionable Strategies

To be viable in the 21st Century, policy needs to support the ability of employers to be flexible and adaptable and to be risk takers with innovative work design options. Policy and government (local, state, or federal) can take the long-term view when developing workplace solutions to inequity. It becomes critical when looking at supporting innovation in work design to remove barriers and disincentives to flexible work options. It is also important to offer policy solutions that generally strengthen the ability of both employers and employees to adapt to a rapidly changing global marketplace and to workplaces undergoing constant transformation because of technological and demographic forces. Actionable strategies outlined for supporting workplace equity included an overview of current examples of policy as well as areas for expanded policy development that appear to have the promise to drive change or support innovation.

- Exploring the development of policy that can encourage voluntary adoption of flexible work options such as the United Kingdom's 'soft-touch' right-to-request flexibility law
- Expanding the FMLA, which was a huge policy shift when it was originally enacted, but has become, it was felt by some in the discussion, a ceiling for workplace flexibility options rather than the floor it was meant to be; this view observes that many employers have taken FMLA as the maximum that is required of them when dealing with employees needing extended leave. In practice, the legislation only covers about half of employees in the U.S. [67]
- Providing incentives to universities and business certificate programs to incorporate management techniques for managing within flexible work environments
- Offering workforce development options that identify industries needing workers and offering training to refit them for new jobs

[66] Cornell Institute for Social and Economic Research. <http://www.ciser.cornell.edu/info/polls.shtml>
[67] Library: Family and Medical Leave. National Partnership for Women & Families. 2007. <www.nationalpartnership.org>

- Supporting the development of clearinghouses of local information on work-life balance policies and options and capturing promising practices
- Supporting the Department of Labor-Women's Bureau's work in nurturing and capturing examples of the development of successful, innovative workplace practices in small and medium-size businesses through its workplace flexibility project[68]
- Funding the coordination for providing direction for employers and employees on how to create flexible work options that are win-win solutions for both; for example, provide checklist(s) for people who want to telecommute or have flexible work options explaining what to ask for, examples of flexible options, and ideas on how to redesign their work options

Discussants also outlined the need for policies that allow greater portability of benefits such as insurance or 401 (K) plans that could make a big difference in the bargaining options for employees and remove some costs from employers. Their ideas included:

- Opening up Medicare to anyone could even the playing field between small and large business in terms of benefits offered to employees; many smaller employees are eliminating health insurance as a benefit because of its high costs; also, the individual insurance market is expensive and nearly impossible to get coverage for a person with a disability; off-and-on ramping workers could benefit from medical coverage that can be maintained via Medicare
- Allowing social security to accrue during time off to raise a family or while helping with eldercare
- Developing portable pension legislation such as that proposed in Washington State would set up a 401(K) benefit plan which citizens could buy into and which would follow them from job to job[69]

---

[68] Department of Labor-Women's Bureau. <http://www.dol.gov/wb/>
[69] "Washington Voluntary Accounts." Economic Opportunity Institute. <www.eoionline.org/Policy_WVA.htm>

## *Closing Discussion Summary*

Prioritizing the exciting ideas and promising practices offered during the Summit was the task of participants during their final two large-group discussions. Attendees divided into two groups—one to prioritize actionable strategies to drive the development and adoption of voluntary practices, and the second to prioritize strategies related to developing and supporting public policies and government programs.

Participants in the voluntary practice discussion identified the workplace practices about which they wanted more information or which they felt could be promoted as promising practices. Within the discussion, they also identified strategies to gather and share practices among stakeholders. Those engaged in the final policy discussion were tasked with identifying areas for public policy development or for the development of supporting research as well as to identify promising practices that could inform policy development. They were also asked to identify policy-related topics about which they desired more information.

### Top Priorities in Voluntary Practice Adoption or Education

Over the course of the next year, it is imperative that those working on developing or supporting promising voluntary workplace programs or policies or who are providing research and information focus on the following key ideas:

1. Provide practical examples of solutions and user-friendly tools that employers of all sizes can use
2. Develop deliberate strategies that lead to culture-change

### Provide practical examples of solutions and user-friendly tools that employers of all sizes can use

Discussion participants provided ideas about examples of promising practices to be pursued and ideas for user-friendly tools that can be utilized by employers of all sizes.

- Provide a centralized database for capturing and sharing promising practices including templates and samples of program materials as well as examples of metrics, survey, or other data capturing instruments and reports. This allows proponents as a group to capture and share what is known about promising practices and help them move the agenda forward. From this, they will have a shared understanding of the current state of knowledge and the efforts around a given practice.
- Study and spread practices that prevent the marginalization of workingwomen and other diverse groups of employees and enable them to become fully engaged in the workplace. When employees are fully engaged in their work, they are more productive and that positively effects the company's bottom-line. Such practices may include the adoption of flexible work polices, the development of affinity groups including women's networks, and the encouragement of mentoring by and of workingwomen and diverse groups.
- Provide venues for employees across industries, employers, researchers, and policymakers to learn about promising practices and receive ideas and templates for implementing them. This can include webinars or audio events, online tutorials, blogs or discussion groups, workshops, seminars and summits.
- Understand the needs of corporations to relate workplace practices to the bottom-line by providing easy access to the latest research and information that provides this perspective. Incorporate this information into a clearinghouse or other centralized database.
- Harness the power of technology to redesign work and use it to fuel more flexible, effective work options for both employers and employees. Share ideas and examples of technology that can support flexible equitable workplace. For example, employers who have already developed flexible programs make scheduling easier within a team environment. Is there a way to translate this software to make it user-friendly for small businesses?

**Develop deliberate strategies that lead to culture-change**

Discussion participants provided ideas about examples of strategies for creating culture-change to be pursued.

- Shift the paradigm from being about offering special populations of employees' accommodations or benefits to what needs to be done to effectively recruit, retain, and engage all employees. Court mainstream media attention for this new view by developing articles and op-eds and utilizing other mechanisms for encouraging public debate.
- Expand the discussion and the development of solutions around creating flexible, equitable workplaces to include the experiences of low-wage employees as well as those in high-wage, often white-collar industries. Current discussions often focus on employees in white-collar, professional industries but low-wage workers have as much or more need for flexible work options.
- "Do diversity." Employers need to understand how demographic and cultural differences that drive their employees' desires for flexibility are driven in part by the splintering of their identities. For many American workers, the impact of this new concept of diversity on their workplaces must be understood. Employers should be encouraged to adopt programs and policies that organize, educate, train, mentor, and provide outreach to diverse populations of employees. This can include the development of affinity groups (i.e. women's networks), the strategic inclusion of people of diverse backgrounds, such as people with disabilities on boards, teams and task forces, etc.
- Encourage employers to incentivize employees to participate in diverse practices by spotlighting teams that model equitable, flexible, and/or diverse practices or rewarding through bonuses or public recognition mentoring of and by diverse populations.
- Support cultural changes in society that increases the value of care giving. Improving the status of care giving and caregivers—including parents or family members of elderly or ill relatives. Increasing numbers of American workers will take on care giving roles over the coming decades. The impact on worker health, productivity, and availability have far-reaching implications for the economy.
- Persuade employers to provide mechanisms that allow employees more control over their work such as access to online blogs or discussion boards that allow teams to develop their own schedules.

## Top Priorities in Public Policy Development and Education

**Three top areas for policy action**

Over the course of the next year, it is imperative that those working on developing policy or providing research and information to support the development of work-life policy focus upon ideas to:

1. Remove barriers to work-life effectiveness options
2. Develop metrics around measuring impacts of work-life effectiveness, equity, and diversity to build the case for change and measure impacts
3. Provide incentives for flexibility

**Remove Barriers to Work-life Effectiveness**

Discussion participants provided ideas about barriers that need to be addressed by public policy or government programs as well as suggestions for how to remove the barriers.

- Understand that work-life flexibility and work-life balance issues directly relate to the prevalence of workplace equity in organizations. Wage equity and workplace equity are key concerns for which policy or regulatory relief may be the primary stimulus to create systemic change.
- Develop a consortium of organizations that can help create a safe space for employers to learn about, make, or pass voluntary workplace policies that will make work-life and workplace flexibility options successful regardless of the size of the company. Encourage organizations that represent diverse worker, employer, and industry perspectives to work together to bring issues and potential solutions to the table for discussion and resolution. Educate the public, employees, and employers on what already exists in policy, regulation,

and voluntary practices regarding work-life, diversity, and workplace equity issues. Convene not only current champions of work-life effectiveness, diversity, and workplace equity, but also those in industries or organizations that are ready for change. Provide a forum to begin the broad-scale distribution of ideas and practices.

- Understand that policy or regulatory solutions need to be scalable based on the size of the organization—small, medium, and large employers have different access to resources that can either inhibit or accentuate the impact of the policy. Policy should help create a level-playing field among employers and provide floors rather than ceilings to the types of programs and supports that they offer.
- Encourage industry-level discussions about work-life issues and their solutions including promising voluntary practices and public policy ideas.
- Support initiatives that provide training to managers to enable them to better manage workers in flexible, diverse, equitable workplace environments. This may include supporting the development of curriculum for MBA programs as well as workplace or certificate programs.
- Encourage initiatives or policy that enables dialogue between employers and employees about flexibility or other work-life issues. A model to consider is the United Kingdom's "soft-touch" right-to-ask law[70].
- Increase the emphasis on health care prevention for employees that can help decrease the use and costs of insurance.
- Support the creation of mechanisms that make it easier for employers to offer their part-time workers benefits as well as career opportunities. For example, how can policy play a role in letting employers ensure proportional benefits to part-timers such that the percentage of hours worked equals the percentage of benefits received.
- Review existing legislation or constitutional amendments that impact workplace equity or flexibility issues (i.e. The 1965 Civil Rights Act, The 1970 Equal Pay Act) with an eye towards updating or expanding them. Revitalize interest in pending work-life and workplace equity legislation and "get it moving." Encourage the use of consensus-based policy dialogue and engagement that involves employers, employees, researchers, and policymakers equally in the development of policy, public-private partnerships or government programs that support win-win solutions to work-life challenges. Engage all stakeholders in developing and passing work-life legislation.

**Develop Metrics**

Discussion participants provided ideas for metrics that could be collected to help policymakers, employers, workingwomen, and men better understand what is currently happening in workplaces as well as to track the effects of change efforts and public policy implementation. They also suggested sources from which those metrics could be collected.

- Develop metrics that can help get the message across to corporate America about the need for and the benefits of work-life, diversity, and workplace equity programs.
- Government can play a vital role in providing clarity around what needs to be measured and how and by being a centralized collection and dissemination-point for data. The Bureau of Labor Statistics, Department of Labor, Census Bureau, and other government agencies need to be supported in collecting and disseminating data that provide an accurate picture of the workplace.
- Work with existing organizations including university centers, nonprofits, and government agencies to help define what needs to be measured, to advance the rationale for data collection, and to provide support to employers as they undertake this process. These same entities can be enabled to take all data that has been studied to date to form a metric sample that can be utilized by private industry to help them develop their own metrics.

---

[70] Levin-Epstein, Jodie. "How to Exercise Flexible Work: Take Steps with a Soft-Touch Law." 2005. <www.clasp.org/publications/work_life_brf3.pdf> ; Also see:  Hegewisch, Ariane. "Employers and European Flexible Working Rights." WorkLifeLaw Issue Brief. 2005. <http://www.uchastings.edu/site_files/WLL/european_issue_brief_printversion.pdf>

- Develop demonstration or pilot projects that work with human resource divisions within a sample of employers to help them collect data that measures their own effectiveness in reaching out to their employees. Provide models of metrics, data collection, and reporting to encourage human resource departments to participate. Consider the development of a public messaging campaign encouraging the adoption of such metrics.
- Consider undertaking the development, collection, and reporting of metrics that measure work-life effectiveness, workplace equity, and diversity as a public-private partnership that should not only include employers, employees, research organizations, and government but specifically is inclusive of employers of all sizes and government agencies from local, state, and federal jurisdictions.

**Provide Incentives for Flexibility**

Discussion participants offered ideas about what might be incentives for employers to design more flexible workplaces as well as suggestions about how to implement incentive programs.

- Understand that there are two schools of thought on how workplace flexibility can be incorporated into America's workplaces—by either legislating employer mandates that require them to design more flexible workplaces or by encouraging the voluntary adoption of practices. These two views about who is ultimately responsible for enabling the large-scale implementation of workplace flexibility are fairly divergent, which can be inhibiting to real change. While efforts to encourage voluntary adoption of promising practices should continue, there were those at the 2006 NES who observed that the voluntary adoption of flexible or equitable workplace practices had stalled and that some policy solutions needed to be considered to un-jam the process of adoption. It was also felt that such policies would be more successful if they also provided incentives to employers.
- Focus on a broader perspective towards enabling the design of flexible workplaces. Develop a role for third party groups to play (i.e. nonprofits such as BPW Foundation) to become mediators and to bridge the two divergent schools of thought.
- Review existing legislation or constitutional amendments with an eye towards updating or expanding them; revitalize interest in pending work-life and workplace equity legislation and "get it moving." Encourage the use of consensus-based policy dialogue and engagement that involves employers, employees, researchers and policymakers equally in the development of policy, public-private partnerships, or government programs that support win-win solutions to work-life challenges. Engage all stakeholders in developing and passing work-life legislation.
- Continue to support and develop government programs that encourage the voluntary adoption of promising practices such as those that encourage companies to mentor other companies in best practices.
- Consider an alternative to federal programs and policies and support state-level initiatives that educate state governments on examples of existing work-life flexibility policies and that encourage the state-by-state adoption of policies and programs that enable workplace flexibility.
- Encourage initiatives or policy that encourages dialogue between employers and employees about flexibility or other work-life issues. A model to consider is the United Kingdom's soft-touch right-to-ask law.
- Work with employers to develop an understanding of what incentives will most likely enable them to design more flexible workplaces. For example, how can policy help employers deal with cost-related issues such as wage replacement, management training, tracking, or implementation expenses. Adapt public policy to fit the needs and resources of different size employers.
- Develop a consortium of organizations that helps to create a safe space for employers to learn about, create, or pass along voluntary workplace policies that make work-life and workplace flexibility options successful regardless of the size of the company. (See more above in *Removing Barriers to Work-Life*.)

## *Follow-up to 2006 National Employer Summit*

In the first months following the 2006 National Employer Summit, BPW Foundation began to implement the strategies identified by Summit participants as top priorities. Through educational activities, policy outreach to U.S. Congressional Staffers, and research efforts, BPW Foundation is following-through on its commitment to Summit attendees to offer them a year's worth of robust resources. Work by the BPW Foundation and other Summit attendees is driving activities that are impacting the development of public policy, government programming, research, and voluntary practices that will help re-design workplaces for workingwomen and men. These workplaces of the present and future will be more likely to model work-life effectiveness and workplace flexibility, equity, and diversity.

**Current and Ongoing Activities Undertaken by BPW Foundation**

Policy Outreach

- BPW Foundation Special Policy Event

BPW Foundation believes that through collaboration it can support the development of public policy that positively impacts the workplace as well as the lives of workingwomen and their families. Special policy events and audio conferences provide participants with the tools they need to discuss and develop public policies that help build successful workplaces and create systemic change. In February 2007, BPW Foundation sponsored a Special Policy Event titled *Building Policy Together: Workingwomen, Employers and Policymakers.*
  - o Carried over themes and ideas identified as priorities during the 2006 NES into the workshops and seminars including a panel discussion on the pending creation of workplace flexibility "soft touch" legislation that invited participants to act as a focus group for researchers and Hill staff.
  - o Introduced key concepts of BPW Foundation's philosophy on policy development to key stakeholders emphasizing consensus-based policy development, making the business case for workplace equity, and enabling government, researchers, policymakers, employers, and workingwomen to work together to create win-win policy solutions.
  - o Sponsored luncheon during which Commissioner Christine M. Griffin of the Equal Employment Opportunity Commission clarified the roles that employers, government, and advocates play in creating equitable workplaces.
  - o Worked in partnership with the Center for Lobbying in the Public Interest and AFSME to co-develop a curriculum on consensus-based policy development.
  - o Offered opportunities for knowledge sharing through a poster session and networking event that featured presentations from the Department of Labor-Women's Bureau among others.

- Policy Resource Activities

In its capacity as a neutral convener and independent clearinghouse and research institution, BPW Foundation has a long and continuing tradition of informing policymakers at all levels on issues impacting workingwomen. After the 2006 NES, BPW Foundation:
  - o Began working with its sister organization, BPW/USA, as a resource to Capitol Hill staffers working on legislation related to workplace flexibility, paid sick leave, paid family and medical leave, etc.
  - o Utilized a workshop at the Special Policy Event as a focus group for a Hill Staffer, allowing workingwomen and small business owners a chance to provide input on key aspects of the draft legislation.
  - o Engaged 2006 NES participants as well as other employer, workingwomen, and research connections in policy development discussions with Hill staffers to ensure that key stakeholders' voices were heard.

      o   Invited to and participated in an Equal Employment Opportunity Commission-sponsored focus group on issues impacting workingwomen.

## Media Outreach & Publicity

      BPW Foundation has strategically expanded outreach for its messaging and research by participating in strategically chosen conferences, seminars, and focus groups that support the development of research, practice and public policy around workplace equity, diversity, and work-life effectiveness. But BPW Foundation is not limiting its outreach to research and policy circles. BPW Foundation is committed to contributing to the public dialogue as well and is developing an outreach strategy that includes contributing to and developing articles and opinion pieces for mainstream media outlets.

## Expansion of the Cross-Sector Network

- Partner Engagement

  - o Two speakers from the 2006 NES were elected to BPW Foundation's Board of Trustees in early 2007. Lisa Hershman, Global Vice President of Operational Excellence and Quality and first Chairwoman of Avnet, Inc.'s Global Women's Forum and Muriel Watkins, Vice President of Human Resources of The New York Times represent major employers with strong work-life and diversity initiatives.
  - o A Department of Labor-Women's Bureau representative reported to BPW in early 2007 that a new collaboration was recently created between the DOL-WB and the DOL-Office of Disability Employment Policy as a result of conversations begun during the 2006 NES. The two agencies will collaborate on workplace flexibility outreach and education.

**Upcoming Activities from BPW Foundation**

## Educational Outreach

- Webinars/Audio Events Series

    BPW Foundation, in conjunction with various program collaborators, offers a series of audio and web conferences on critical workplace issues. Upcoming topics include *Flexibility: Management's Perspective, Work Design: Flexibility Versus Face Time, Supporting Women Veterans, Building Public Policy Together: Consensus-Based Policy Creation, Workplace Flexibility: Developing a Strategic Plan for Public Policy Development.* In addition to publicly available webinars, members of BPW Foundation's employer advisory network, which includes past Summit participants, will have access to special webinars focused on peer-to-peer knowledge sharing around topics raised during the Summit. Recordings and resources from prior calls are available at www.bpwfoundation.org.

- Women's Network Knowledge Sharing Series and Online Tutorial

    During the 2006 National Employer Summit, the creation of mechanisms to decrease the isolation felt by women and minorities and to improve their access to critical work assignments and professional development opportunities was identified as a critical step in increasing both workplace equity and diversity in America's workplaces. The development of affinity groups which incorporated mentoring and targeted career mobility opportunities was identified as a promising voluntary employer practice that appeared to effectively address these issues. As part of its commitment to promote the dissemination and adoption of promising voluntary workplace practices identified during the Summit, Business and Professional Women's Foundation is developing a Women's Networks Series.

The Women's Network Series will integrate online learning, peer-to-peer knowledge sharing, articles and web-based events to increase the level of knowledge about how to create women's networks within the workplace. The series will also explain with women's networks can and can't do to increase women's career mobility and to foster equity and diversity. The project will be launched with a panel discussion on women's networks to be held in Reno, Nevada in July 19, 2007 as part of BPW Foundation's Women's Advancement Luncheon and Seminar. The luncheon and seminar take place during the 2007 BPW/USA National Conference. For more information visit, www.bpwusa.org/nationalconference.

- Expansion of Rawalt Online Resource Center

Over the next three years, BPW Foundation will continue to convert its extensive physical archive, the *Marguerite Rawalt Resource Center* (Rawalt), into an easy-to-access online resource center. In response to requests by Summit participants for a comprehensive database that captures the latest in effective practices and information on policy development in one place, BPW Foundation will emphasize the collection of materials and links on work-life, diversity, and equity over the next year of the online resource center's expansion. Materials from participating 2006 NES organizations and employers will be highlighted along with those from additional university centers, national and international government websites, and innovative employers. But, Rawalt will not simply be a passive repository; through the Rawalt project, the knowledge contained within in it will be disseminated via e-newsletters, articles, op-eds, webinars, and online tutorials to mainstream publications, employers, researchers, workingwomen advocates and policymakers. To visit the resource center, visit www.bpwfoundation.org.

- Quarterly Newsletter on Policy & Practice

In Summer 2007, BPW Foundation is launching a quarterly e-newsletter for employers, workingwomen, researchers, and policymakers that will feature articles and bibliographies on voluntary practice and public policy areas identified at the 2006 National Employer Summit.

- 2008 National Employer Summit

To answer the demand for safe places for employers, policymakers, researchers, and advocates to meet and share promising practices and public policy insights, BPW Foundation will host a 2008 National Employer Summit. BPW Foundation's 2008 National Employer Summit, to be held Summer 2008, will showcase research, voluntary practices, and information on public policy or government programs that helps employers build workplaces that model workplace flexibility, workplace equity, and diversity. Champions among employers, researchers, government officials, and policymakers will be highlighted as they present the latest research or promising practices that impact workplaces. Summit seminars will also examine the laws and regulations that impact employers in these areas and illuminate the rights and responsibilities employers and employees have under them. Opportunities for professional development, networking, and small-group discussions will be featured throughout the event. For more information on how to participate in the 2008 NES, e-mail foundation@bpwfoundation.org.

Expansion of the Cross-Sector Network

- Employer Advisory Network

In 2005, BPW Foundation established the nucleus of a new cross-sector network of employers, workingwomen, researchers, and government agencies. The network's purpose is to identify and implement the systemic changes needed to fully empower workingwomen and to advise, promote and participate in BPW Foundation programming and research activities. To date, over 60 organizations have shared their knowledge and resources to support BPW Foundation's research, education and professional development events. In 2007, BPW Foundation will formalize relationships with a number of its employer advisory network members to engage in collaborative research and educational projects on topic areas arising from the 2006 NES.

BPW Foundation values the knowledge and expertise of its network members. The contribution of their know-how, content expertise, and funding helps BPW Foundation achieve its mission to empower workingwomen to

achieve their full potential and to partner with employers to build successful workplaces. In return, those who work with BPW Foundation are engaged in cutting-edge innovative programming, informed by quality research, which provides a future-oriented perspective aimed at creating change. Through their interactions with BPW and participation in our programming and research, our partners are empowered to build better futures for themselves, their workplaces and their communities.

As a member of the employer advisory network, participants have opportunities to:

- Be part of a speaker's bureau on work-life effectiveness, workplace equity, diversity or similar workplace issues. Speaker bureau members participate in:
  o BPW Foundation's educational and policy workshops, seminars, webinars
  o Are referred as speakers for key conferences, panels, or hearings to our other partners around the country and on Capitol Hill
  o Are referred to members of the press as content experts
  o Are invited to participate in media events including press conferences and briefings
- Participate in focus groups conducted with local, state or national staffers for elected officials to inform the development of public policy on issues that impact your business/mission.
- Inform the development of and participate in our research projects including case studies, focus groups, surveys, etc.
- Inform the development of and participate in our many educational and professional development opportunities including a quarterly electronic newsletter, audio and web events, workshops and seminars and the National Employer Summit.
- Have access to and be encouraged to link examples of your promising practices, research or conference materials to the Rawalt Online Resource Center, BPW Foundation's growing archive of resources exploring research, policy, knowledge and education related to work-life effectiveness, career transitions, workplace equity and diversity.

## *Work-life Effectiveness, Workplace Equity, and Diversity Resources*

Items listed in the bibliography were compiled based on a general review of work-life literature at the time of the 2006 National Employer Summit, suggestions from Summit speakers, and recent updates.

## *BIBLIOGRAPHY:* Life-Cycle Induced Transitions[71]

| A check mark in one of the boxes to the right indicates the resource contains information on work-life effectiveness (WE), diversity (D) or workplace equity (WQ) | | | |
|---|---|---|---|
| **Life-Cycle Induced Transitions**<br>Life-cycle induced transitions are the result of the changing expectations and responsibilities adults experience as they move through their life-cycle such as becoming a parent, taking care of an elderly or ill relative, or achieving a personal growth goal. The resources listed in this section relate to research and practices that relate to life-cycle induced transitions. | **WE** | **D** | **WQ** |
| *2002 National Study of the Changing Workforce* – The Families and Work Institute, 2002. http://www.familiesandwork.org/summary/nscw2002.pdf | ✔ | ✔ | |
| *A Business Perspective on Workplace Flexibility: When Work Works, an Employer Strategy for the 21st Century*, Healy, C., Families and Work Institute, 2005. http://www.familiesandwork.org/3w/research/downloads/cwp.pdf | ✔ | ✔ | ✔ |
| *A Question of Justice: Disparities in Employees' Access to Flexible Schedule Arrangements*, Swanberg, J. E., Pitt-Catsouphes, M. and Drescher-Burke, K., *Journal of Family Issues*, Vol. 26, No. 6., September, 2005. | | | ✔ |
| *A Review of Federal Family-friendly Workplace Arrangements*, U.S. Office of Personnel Management, Washington, D.C., Author, 1998. | ✔ | | ✔ |
| *Annual Benefits Survey*, Society for Human Resource Management 2005. www.shrm.org | ✔ | | |
| *Are Women Opting Out? Debunking the Myth.*, Boushey, H., Washington, DC: Center for Economic and Policy Research, November 2005. | ✔ | | |
| *Bold Initiative.* http://www.sloan.org/report/2004/workplace.shtml | ✔ | | |
| *Bottom-Line Benefits of Work/Life Programs.* Landauer, J., *HR Focus*, 3-4, July, 1997. | ✔ | | |
| *Business Impacts of Flexibility: An Imperative for Expansion*, Corporate Voices for Working Families, 2005. http://www.cvworkingfamilies.org/flex_report/flex_report.shtml | ✔ | ✔ | |
| *California Disability Access Information.* www.disabilityaccessinfo.ca.gov/default.htm | | ✔ | ✔ |
| *Caregiving in the United States*, AARP and the National Alliance for Caregiving, April 2004. http://assets.aarp.org/rgcenter/il/us_caregiving.pdf | ✔ | ✔ | |
| *Disability Discrimination,* Equal Employment Opportunity Commision. www.eeoc.gov | | ✔ | ✔ |
| *Disability Statistics: Online Resource for U.S. Disability Statistics,* Cornell University. www.ilr.cornell.edu/edi/disabilitystatistics/ | | ✔ | ✔ |
| *Economic Grand Rounds: The Business Case for High-Quality Mental Health Care,* Sederer, Llody, M.D., and Clemens, Norman A., American Psychiatric Association-Psychiatric Services Online, 2000. http://psychservices.psychiatryonline.org/cgi/content/full/53/2/143 | ✔ | | |

---

[71] Forces Impacting 21st Century Workplaces and Workforces. BPW Foundation. 2006. <www.bpwfoundation.org>

| | | | |
|---|---|---|---|
| *Employer Characteristics and the Provision of Family Responsive Policies*, Glass, J.and Fujimoto, T., *Work and Occupations: An International Sociological Journal,* Vol.22, No.4, p.380-411.November 1995. | ✔ | | ✔ |
| *Employers and European Flexible Working Rights: When the Floodgates Were Opened* , Hegewisch, A., WorkLifeLaw Issue Brief, University of California, Hastings, 2005. | ✔ | | ✔ |
| *Every Other Thursday: Stories and Strategies from Successful Women Scientists*, Daniell, E., Yale University Press, 2006. | ✔ | ✔ | |
| *Fact Sheet, Meeting the Needs of Today's Families: The Role of Workplace Flexibility*, Workplace Flexibility 2010, Spring 2006. http://www.law.georgetown.edu/workplaceflexibility2010/documents/FF_BW_F | ✔ | | ✔ |
| *Fact Sheet, Older Workers and the Need for Workplace Flexibility*, Workplace Flexibility 2010, Summer, 2005. http://www.law.georgetown.edu/workplaceflexibility2010/docs/2005_0718_ | ✔ | ✔ | |
| *Fact Sheet, Promoting Children's Well-Being: The Role of Workplace Flexibility*, Workplace Flexibility 2010, Fall, 2006. http://www.law.georgetown.edu/workplaceflexibility2010/documents/FF_Colo | ✔ | | |
| *Facts on Short Term Time Off*, Workplace Flexibility 2010, Winter, 2006. http://www.law.georgetown.edu/workplaceflexibility2010/definition/genera | ✔ | | ✔ |
| *Family and Medical Leave/Library,* National Partnership for Women and Families. www.nationalpartnership.org | ✔ | | ✔ |
| *Family Life Balance*, Hill, J. E., Hawkins, A.J., Ferris, M. and Weitzman, M., *Family Relations*, Vol. 50, No. 1, pp. 49-58, 2001. | ✔ | | |
| *Family-Friendly Policies: Boosting Mother's Wages*, Boushey, H., Washington, DC: Center for Economic and Policy Research, April 6, 2005. | | ✔ | ✔ |
| *Flexibility Needed in Modern Workplace*, BenefitNews.com, http://www.benefitnews.com/detail.cfm?id=9009 | ✔ | | |
| *Flexibility: A Critical Ingredient in Creating an Effective Workplace-* http://familiesandwork.org/3w/research/downloads/3w.pdf | ✔ | | |
| *Flexible and Compressed Schedules in Federal Agencies, Report to the ranking minority member, Subcommittee on civil service, Committee on Government Reform and Oversight, House of Representatives, Federal Workforce: Agencies' policies and views on flexiplace in the federal government* (GAO/GGD-97-116). U.S. General Accounting Office (1997), Washington, D.C.: U.S. Government Printing Office; U.S. General Accounting Office (1985), *Statement of Rosslyn S. Kleeman, Associate Director, General Government Division before the Subcommittee on Human Resources of the House Civil Service and Post Office Committee,* Washington, D.C., U.S. Government Printing Office. | ✔ | ✔ | ✔ |
| *Flexible Work Arrangements: The Fact Sheet*, Workplace Flexibility 2010, Spring, 2006.http://www.law.georgetown.edu/workplaceflexibility2010/definition/genera | ✔ | | |
| *Flexible Work Arrangements: The Overview Memo*, Workplace Flexibility 2010, Spring, 2006.http://www.law.georgetown.edu/workplaceflexibility2010/definition/genera | ✔ | | |
| *Flexible Work Options and Older Workers*. Christiansen, K., The Alfred P. Sloan Foundation and The Sloan Center for Flexible Work Options and Older Workers at Boston College, http://www.winningworkplaces.org/library/research/rs_sloanflexibleoptions.php | ✔ | ✔ | |
| *Flexible Workplace Policies and Practices for the Low-Wage and -Income Workforce*. Bond, J.T., Galinsky, E.and Backon, L. New York: Families and Work Institute, 2006. | ✔ | | ✔ |

| Document | | | |
|---|:---:|:---:|:---:|
| *Flexing Your Workplace Muscles,* Gans, Stefanie, BusinessWoman Magazine, June 2007. www.businesswomanmagazine.com | ✔ | | |
| *Follow the Flock,* Cornell, Christoper, Human Resource Executive Online, 2006. www.hreonline.com/HRE/storyid=6367339 | ✔ | ✔ | |
| *Forgotten Families.* Heymann, J., Oxford University Press, 2006. | ✔ | | |
| *Gap Widens Between Working Age People With and Without Disabilities,* Meyers, Linda, Cornell University, 2005. www.news.cornell.edu/stories/Octo05/Disab.work.rpt.html | | ✔ | ✔ |
| *Gender Bias in the Current Economic Recovery?: Declining Employment Rates for Women in the 21st Century*, Boushey, H., Baker, D. and Rosnick, D., Washington, DC: Center for Economic and Policy Research, August, 2005. | | ✔ | ✔ |
| *Getting Punched: The Job and Family Clock*, Center for Law and Social Policy, July, 2006. http://www.clasp.org/publications/getting_punched_fullnotes.pdf | ✔ | | |
| *Getting Time Off: Access to Leave Among Working Parents,* Ross Phillips, K., Urban Institute, 2004. http://www.urban.org/publications/310977.html | ✔ | | |
| *Government Policies Supporting Workplace Flexibility: The State of Play in Japan*, Sumiko, I., Paper presented at the Alfred. P. Sloan International Conference on Why Workplace Flexibility Matters: A Global Perspective. May 16-18, 2006. | ✔ | | ✔ |
| *Hardships in America: The Real Story of Working Families*, Boushey, H., Brocht, C., Gundersen, B. and Bernstein, J., 2001. | ✔ | | ✔ |
| *How Time-Flexible Work Policies Can Reduce Stress, Improve Health, and Save Money*, Lineberry, J. and Trumble, S., Stress and Health, 21(3), 157-168, Winter, 2000. | ✔ | | |
| *Impact of Proposed Minimum-Wage Increase on Low-income Families*, Boushey, H. and Schmidt, J., Washington, DC: Center for Economic and Policy Research, December 2005. | ✔ | | |
| *Job Protected Leave for Parental Involvement in School Activities: Legislative Update*, National Partnership for Women and Families, 2005. http://www.nationalpartnership.org | ✔ | | |
| *Legal and Research Summary Sheet: Phase Retirement,* Center on Aging and Work/Workplace Flexibility. http://agingandwork.bc.edu/documents/Center_On-AgingandWork_Phased_Retirement.pdf. | ✔ | ✔ | ✔ |
| *Life's Work: Generational Attitudes Toward Work & Life Integration.* Radcliffe Public Policy Center, .Cambridge, MA: Author, p. 3, 2000. | ✔ | | |
| *Low-Income Working Families : Facts And Figures Assessing the New Federalism*, Urban Institute, 2005. http://www.urban.org/url.cfm?ID=900832 | | | ✔ |
| *Measuring the Impact of Workplace Flexibility Findings*, National Work/Life Measurement Project, Boston College Center for Work & Family, October, 2000. http://www.bc.edu/centers/cwf/rt/meta-elements/pdf/flexexecsumm.pdf | ✔ | | ✔ |
| *Older Workers: Labor Can Help Employers and Employees Plan Better for the Future,* United States Government Accountability Office. 2005 | | ✔ | |
| *One Sick Child Away From Being Fired: When Opting Out Is Not an Option*, Williams, J. C., *Work Life Law*, UC Hastings College of the Law, 2006. | ✔ | | |
| *Poverty and Income: Financial Support and Parental Involvement,* U.S. Department of Health and Human Services, 2002. http://aspe.hhs.gov/hsp/02trends/ES3/pdf | | | ✔ |
| *Project for Attorney Retention,* Williams, J. and Calvert, C.T., February, 2004. http://www.pardc.org/ | ✔ | ✔ | |
| *Raising Profits and Potential:Return on Investment for Work-life Effectiveness, Diversity, Workplace Equity: 2006 National Employer Summit Conference Papers* | ✔ | ✔ | ✔ |

| | | | |
|---|:-:|:-:|:-:|
| *and Discussion Summary,* Business and Professional Women's Foundation, June 2007. www.bpwfoundation.org | | | |
| *Reframing the Business Case for Work-Life Initiatives.* Galinsky, E. and Johnson, A., New York, NY: Families and Work Institute,1998. | ✔ | | |
| *Report of Findings: Parental After-School Stress Project*, Barnett, R. and Gareis, K.C.,Community, Families, and Work Program, Brandeis University, 2004.http://www.bcfwp.org/passreport.pdf | ✔ | | |
| *Running Faster to Stay in Place: The Growth of Family Work Hours and Incomes,* Bernstein, J.and Kornbluh, K. New America Foundation. 2005. http://www.newamerica.net/Download_Docs/pdfs/Doc_File_2437_1.pdf | ✔ | | ✔ |
| *Short Term Time Off: The Current State of Play, Workplace Flexibility 2010*, Winter, 2006. http://www.law.georgetown.edu/workplaceflexibility2010/definition/genera l/ST | ✔ | | ✔ |
| *Sloan Work and Family Research Network.* www.wfnetwork.bc.edu | ✔ | ✔ | ✔ |
| *Starbucks Diversity,* Starbucks, 2002. www.starbucks.com/aboutus/SB-Diversity-Fin.pdf | | ✔ | |
| *Staying Ahead of the Curve 2003: The AARP Working in Retirement Study*. AARP, Washington, D.C.: Author, p. 4, 2003. http://assets.aarp.org/rgcenter/econ/multiwork_2003.pdf. | | ✔ | ✔ |
| *Staying Ahead of the Curve: The AARP Work and Career Study,* Montenegro, X.P., Fisher L.,and Remez., S., AARP, 2002. http://assets.aarp.org/rgcenter/econ/d17772_ multiwork.pdf | | ✔ | ✔ |
| *Study: Flexible Schedules Boost Performance, Productivity*, Gurchiek, K., Society for Human Resource Management, July 20, 2005. http://www.shrm.org/hrnews_published/archives/CMS_013419.asp | ✔ | | |
| *Tag-Team Parenting*, Boushey, H., Washington, DC: Center for Economic and Policy Research, August 2006. | ✔ | | |
| *The 1997 National Study of the Changing Workforce,* Bond, J.T, Galinsky, E., and Swanberg, J.E., New York, NY: Families and Work Institute, 1998. | ✔ | ✔ | ✔ |
| *The 1998 Business Work-Life Study: A Sourcebook,* Galinsky, E., and Bond, J.T., New York, NY: Families and Work Institute, 1998. | ✔ | ✔ | ✔ |
| *The Alternative Workplace: Changing Where and How People Work,* Harvard Business Review, Reprint 98301, 1998. http://harvardbusinessonline.hbsp.harvard.edu. | ✔ | ✔ | |
| *The Debt Explosion Among College Graduates,* Boushey, H., Washington, DC: Center for Economic and Policy Research, April 3, 2003. | | | ✔ |
| *The Effects on Employment and Wages when Working Mothers Lose Medicaid and Child Care Subsidies*, Washington, DC: Center for Economic and Policy Research, January 2005. | | ✔ | ✔ |
| *The Federal Employees Flexible and Compressed Work Schedules Act (FEFCWA),*Workplace Flexibility 2010, Spring, 2006. http://www.law.georgetown.edu/workplaceflexibility2010/definition/genera | | | ✔ |
| *The Federal Employees Flexible and Compressed Work Schedules Act (FEFCWA),*Workplace Flexibility 2010, Spring, 2006. http://www.law.georgetown.edu/workplaceflexibility2010/definition/genera | | | ✔ |
| *The Federal Employees Flexible and Compressed Work Schedules Act (FEFCWA),*Workplace Flexibility 2010, Spring, 2006. http://www.law.georgetown.edu/workplaceflexibility2010/definition/genera | ✔ | | ✔ |
| *The Hidden Brain Drain*, Harvard Business Review Research Report, 2005. http://harvardbusinessonline.hbsp.harvard.edu | ✔ | ✔ | ✔ |

| | | | |
|---|:-:|:-:|:-:|
| *The New South Wales Careers' Responsibilities Act*, Workplace Flexibility 2010, Spring, 2006. http://www.law.georgetown.edu/workplaceflexibility2010/definition/genera | | | ✓ |
| *The State Of Working America 2004/2005.* Mishel, L,, Bernstein, J. and Allegretto,S., Cornell University Press, 2005. (See specifically, Table 3.7.) http://www.epinet.org/content.cfm/books_swa2004 | ✓ | ✓ | ✓ |
| *The State of Working America*, Boushey, H., Lawrence, M. and Bernstein, J, Cornell University Press. 2002. | ✓ | ✓ | ✓ |
| *The State of Work-life Effectiveness,* Business & Professional Women's Foundation, July, 2006. http://www.bpwusa.org/i4a/pages/index.cfm?pageid=5032 | ✓ | ✓ | ✓ |
| *The Time Bandit: What U.S. Workers Surrender to Get Greater Flexibility in Work Schedules*, Golden, L., Economic Policy Institute, Issue Brief #146, 2000. http://www.epinet.org/content.cfm/issuebriefs_ib146 | ✓ | | ✓ |
| *The United Kingdom Flexible Working Act*, Workplace Flexibility 2010, Spring, 2006. http://www.law.georgetown.edu/workplaceflexibility2010/definition/genera | ✓ | | ✓ |
| *The Way We Work: How Children and Their Families Fare in a 21st Century Workplace.* Boots, S.W., New America Foundation, 2004. Also, personal Correspondence between Shelley Waters Boots and the U.S. Census Bureau, Bureau of Labor Statistics. http://newamerica.net/Download_Docs/pdfs/Doc_File_2146_1. pdf | ✓ | | |
| *Washington Voluntary Accounts*, Economic Opportunity Institute. www.eoionline.org/policy_WVA.htm | ✓ | | |
| *The Work, Family, and Equity Index: Where Does the United States Stand Globally?* Heymann, J., Earle, A., Simmons, S., Breslow, S.M., and Kuehnhoff, A., The Project on Global Working Families, Harvard University, 2004. http://www.globalworkingfamilies.org/ | ✓ | | ✓ |
| *Unlawful Disparate Treatment of Workers with Caregiving Responsibilities*, Equal Employment Opportunity Commission, 2005. www.eeoc.gov/abouteeoc/meetings/5-23-07/index.html | ✓ | ✓ | ✓ |
| *Using Flexible Schedules in the Managerial World: The Power of Peers.* Kossek, E. E., A.E. Barber, and D. Winters. Human Resource Management, 38 (1). 1999. | ✓ | | ✓ |
| *Valuing Fathers,* Gray, D.and Warren, R., New America Foundation, http://www.newamerica.net/publications/policy/valuing_fathers | ✓ | | |
| *When Done Right, Work Supports Work: Medicaid and Mothers' Employment and Wages*, Boushey, H., Washington, DC: Center for Economic and Policy Research, March 16, 2005. | ✓ | ✓ | ✓ |
| *When Work Works: a Status Report on Workplace Flexibility,* Bond, J.T., Galinsky, E. and Hill, J.E., IBM and the Families and Work Institute, 2004. http://familiesandwork.org/3w/research/downloads/status.pdf | ✓ | | |
| *Who Cares? Child Care Choices of Working Mothers*, Boushey, H., Washington, DC: Center for Economic and Policy Research, Data Brief No. 1, May 6, 2003. | ✓ | | |
| *Who Gets to Ride the High Road? The Distribution of Flexible Schedules in the U.S.,* Appelbaum, E. and Golden, L., Paper presented at the conference, From 9-to-5 to 24/7: How Workplace Changes Impact Families, Work and Communities,February 28-March 1, 2003. http://www.bcfwp.org/Conference_papers/Golden-Appleb-flex-sched.doc | ✓ | | |
| *Work and Family Connections. Flexible Work Arrangements.* # 11823, Royal Bank Financial Group, July, 1998. http://www.royalbank.com | ✓ | | |

| | | | |
|---|---|---|---|
| *Work and Family: How Employers and Workers Can Strike the Balance*, John J. Heldrich Center for Workforce Development & Center for Survey Research and Analysis, New Brunswick, New Jersey & Storrs, Connecticut: Author, p. 6, March, 1999. | ✔ | | |
| *Work Family Policy: Its Critical Impact on American Women and Families*. Heymann, J., Paper presented at Capitol Hill Briefing Series on Women's Health Policy, Washington, D.C. October 8, 2003. http://www.hsph.harvard.edu/globalworking families/Powerpoint/WFPolicyUS.pdf | ✔ | ✔ | ✔ |
| *Work-family Balance and Job Satisfaction: The Impact of Family-friendly Policies on Attitudes of Federal Government Employees*, Saltzstein, A.L., Ting, Y., and Saltzstein, G.H., Public Administration Review 61(4), p. 453, 2001. | ✔ | | ✔ |
| *Work-family Benefits: Which Ones Maximize Profits*? Meyer, C.S., Mukerjee, S., and Sestero, A., *Journal of Managerial Issues* 13(1), p. 38; Halpern, D.F., May, 2005. | ✔ | | |
| *Working in a 24/7 Economy: Challenges for American Families.* Presser, H. B., University of Maryland and the Center for Advanced Study in the Behavioral Sciences. 2003. (See also, National Institute for Occupational Safety and Health Topic WorkSchedules: Shift Work and Long Work Hours.)http://www.cdc.gov/niosh/topics/workschedules/abstracts/presser.htm | ✔ | | ✔ |
| *Working Moms and Child Care.* Boushey, H. and Wright, J., Washington, DC: Center for Economic and Policy Research, May 5 2004. | ✔ | ✔ | |
| *Work-Life Balance, Management Practices and Productivity,* Bloom, N., Kretschmer,T., and Reenen, J.V., Centre for Economic Progress, London School of Economics, 2006. http://cep.lse.ac.uk/management/worklifebalance_ research.pdf | ✔ | | ✔ |
| *Workplace flexibility: What is it? Who has it? Who wants is? Does it make a difference?* Galinsky, E., Bond, J.T., & Hill, E., New York: Families and Work Institute, 2004.  http://familiesandwork.org/3w/research/downloads/status.pdf | ✔ | | |
| *Workplace flexibility: What It Is and How to Get It, Gehl,* Elisabeth, BusinessWoman Magazine, June 2007. www.businesswomanmgazine.org | ✔ | | ✔ |
| *Young Caregivers in the U.S.: Findings from a National Survey*, Hunt, G., Levine, C.and Naiditich, L., National Alliance for Caregiving in collaboration with United Hospital Fund, 2005. | ✔ | ✔ | |

## *BIBLIOGRAPHY CONTINUED:* Career-Focused Transitions[72]

| <u>**Career-Focused Transitions**</u><br>Career-focused transitions occur as employees move along the continuum of their career—requiring and wanting new skills and experiences that can enhance their employability. The resources listed in this section relate to research and practices that relate career-focused transitions. | **WE** | **D** | **WQ** |
|---|:---:|:---:|:---:|
| *Annual Benefits Survey*, Society for Human Resource Management 2005. www.shrm.org | ✔ | | |
| *Bold Initiative.* http://www.sloan.org/report/2004/workplace.shtml | ✔ | | |
| *Employee Engagement: A Review of Current Research and Its Implications,* John Gibbons, The Conference Board, 2007. | ✔ | | |
| *Encouraging Job Advancement Among Low Wage Workers: A New Approach*, Holzer, H., April, 2006. http://www.brookings.edu/es/research/projects/wrb/publications/pb/pb30.htm | | | ✔ |
| *Every Other Thursday: Stories and Strategies from Successful Women Scientists*, Daniell, E., Yale University Press, 2006. | ✔ | ✔ | |
| *Gender-Bias in the Current Economic Recovery: Declining Employment Rates for Women in the 21st Century,* Boushey, Heather, Center for Economic and Policy Outreach. www.cepr.org. | | ✔ | ✔ |
| *Hard Times in the New Millennium: The Fate of Youth in the Bush Years,* Boushey, H. and Schmitt, J., Washington, DC: Center for Economic and Policy Research, November 1, 2003. | | ✔ | ✔ |
| *How Can Employers Increase the Productivity and Retention of Entry-Level, Hourly Workers,* James T. Bond, Ellen Galinsky, Families and Work Institute, 2007. http://familiesandwork.org/site/research/reports/brief2.pdf | ✔ | | ✔ |
| *Leadership In Your Midst: Tapping the Hidden Strengths of Minority Executives,* Hewlit, Sylvia Ann; Luce, Carolyn Buck; West, Cornel, Harvard Business Review, 2005. | | ✔ | ✔ |
| *Legal and Research Summary Sheet: Phase Retirement,* Center on Aging and Work/Workplace Flexibility. http://agingandwork.bc.edu/documents/Center_On-AgingandWork_Phased_Retirement.pdf. | ✔ | ✔ | ✔ |
| *Mentoring: A Workplace Best Practice,* Gans, Stefanie, BusinessWoman Magazine June 2007. www.businesswomanmagazine.org | | ✔ | ✔ |
| *Model Policy for Employers, WorkLifeLaw.* www.uchastings.edu/site_files/WLL/modelpolicyforemployers.pdf | | ✔ | ✔ |
| *No Way Out: How Prime Age Workers Get Trapped in Minimum Wage Jobs,* Boushey, H, Washington, DC: Center for Economic and Policy Research, May 2005. | | ✔ | ✔ |
| *Older Workers: What Keeps Them Working?* Pitt-Catsouphes, M, and Smyer M., Boston College Center on Aging and Work/Workplace Flexibility. Boston College, Issue Brief 01, 2005. http://agingandwork.bc.edu/documents/Center_On_Aging_and_Work_Brief_One.pdf | | ✔ | ✔ |
| *Phased Retirement Overview: Summary of Research and Practices,* Brainard, K., Prepared for the NASRA Phased Retirement Committee, Retrieved July 26, 2005. www.nasra.org/resources/Phased%20Retirment%20Overview.pdf | ✔ | ✔ | |
| *Raising Profits and Potential:Return on Investment for Work-life Effectiveness, Diversity, Workplace Equity: 2006 National Employer Summit Conference Papers and Discussion Summary,* Business and Professional Women's Foundation, June | ✔ | ✔ | ✔ |

---

[72] <u>Forces Impacting 21st Century Workplaces and Workforces.</u> BPW Foundation. 2006. <www.bpwfoundation.org>

| | | | |
|---|---|---|---|
| 2007. www.bpwfoundation.org | | | |
| *Responsive Workplaces: The business case for employment that values fairness and families,* Jodie Levin-Epstein, Center for Law and Social Policy, Reprinted from the Mother Load, a special report in the American Prospect, March 2007. | ✔ | | ✔ |
| *Sloan Work and Family Research Network.* www.wfnetwork.bc.edu | ✔ | ✔ | ✔ |
| *Staying Employed After Welfare: Work Supports and Job Quality Vital to Employment Tenure and Wage Growth*, Boushey, H., Washington, DC: Economic Policy Institute, June 2002. | | ✔ | ✔ |
| *Student Debt: Bigger and Bigger,* Boushey, H*.,* Washington, DC: Center for Economic and Policy Research, September 2005. | | ✔ | ✔ |
| *The Hidden Brain Drain*, Harvard Business Review Research Report, 2005. http://harvardbusinessonline.hbsp.harvard.edu | ✔ | ✔ | ✔ |
| *The New York Times Company Journalism Ethics Policy,* 2005. http:www.nytco.com/company-journalism-ethics.html#standards | | ✔ | |
| *The Nonprofit Sector: Where Women Go to Work*, Van Buren, Jane A., unpublished manuscript in partial fulfillment of Executive Doctorate of Management Degree, Case Western University, Cleveland, OH, 2003 | | ✔ | ✔ |
| *The Status of Telework in the Federal Government 2005,* Office of Personnel Management, 2005. www.telework.gov/documents/tw_rpt05/index.asp | ✔ | | |
| *Workplace Flexibility for Lower-Wage Workers,* Corporate Voices for Working Families, 2006. www.cvwf.org | ✔ | ✔ | ✔ |

# *BIBLIOGRAPHY CONTINUED:* Market or Workplace Induced Transitions[73]

| **Market or Workplace Induced Transitions**<br>Market or workplace-induced transitions are precipitated by changes in the market or in the workplace and put pressure on both employers and employees to adapt. The resources listed in this section relate to research and practices that relate to market or workplace induced transitions. | **WE** | **D** | **WQ** |
|---|:---:|:---:|:---:|
| *2006 Flex In the City Campaign,* City of Houston, 2007. www.houstontx.gov/flexworks/flexinthecity/index.html | ✔ | | |
| *5USC Chapter 63-Leave,* the U.S. Code. http://uscode.house.gov/download/pls/0563.txt | ✔ | | |
| *California Disability Access Information.* www.disabilityaccessinfo.ca.gov/default.htm | | ✔ | ✔ |
| *California Employment Development Department.* www.edd.ca.gov | ✔ | | |
| *Community Service Contributions Credit,* Kansas Department of Revenue, 2007. www.ksrevenue.org/taxcredits-community.htm | ✔ | | |
| *Disability Discrimination,* Equal Employment Opportunity Commision. www.eeoc.gov | | ✔ | ✔ |
| *Disability Statistics: Online Resource for U.S. Disability Statistics,* Cornell University. www.ilr.cornell.edu/edi/disabilitystatistics/ | | ✔ | ✔ |
| *Economic Grand Rounds: The Business Case for High-Quality Mental Health Care,* Sederer, Llody, M.D., and Clemens, Norman A., American Psychiatric Association-Psychiatric Services Online, 2000. http://psychservices.psychiatryonline.org/cgi/content/full/53/2/143 | ✔ | | |
| *Employers and European Flexible Working Rights*, Hegewisch,Ariane, WorkLifeLaw, 2005. www.uchasting.edu/site_files/WLL/european_issue_brief_printversion.pdf | ✔ | | ✔ |
| *Family and Medical Leave/Library,* National Partnership for Women and Families. www.nationalpartnership.org | ✔ | | ✔ |
| *Feeling Overworked: When Work Becomes Too Much,* Galinsky, Ellen; Kim, Stacy S.; Bond, James T., 2001. www.familiesandwork.org | ✔ | | |
| *Follow the Flock,* Cornell, Christoper, Human Resource Executive Online, 2006. www.hreonline.com/HRE/storyid=6367339 | ✔ | ✔ | |
| *Flexing Your Workplace Muscles,* Gans, Stefanie, BusinessWoman Magazine, June 2007. www.businesswomanmagazine.com | ✔ | | |
| *For Welfare Reform to Work, Jobs Must Be Available*, Boushey, H. and Rosnick, D., Washington, DC: Center for Economic and Policy Research, April 1, 2004. | | | ✔ |
| *Forces Impacting 21$^{st}$ Century Workforces and Workplaces*: *A Discussion Guide for Local Summits or Workplace Discussions,* Business & Professional Women's Foundation , January, 2006. http://www.bpwusa.org/i4a/pages/index.cfm?pageid=4890 | ✔ | ✔ | ✔ |
| *Former Welfare Families Need More Help: Increased Hardships Await Those Making Transition to Workforce*, Boushey, H., Washington, DC: Economic Policy Institute, April 2002. | | | ✔ |
| *Gap Widens Between Working Age People With and Without Disabilities,* Meyers, Linda, Cornell University, 2005. www.news.cornell.edu/stories/Octo05/Disab.work.rpt.html | | ✔ | ✔ |
| *Gender-Bias in the Current Economic Recovery: Declining Employment Rates for Women in the 21$^{st}$ Century,* Boushey, Heather, Center for Economic and Policy Outreach. www.cepr.org. | | ✔ | ✔ |

---

[73] Forces Impacting 21$^{st}$ Century Workplaces and Workforces. BPW Foundation. 2006. <www.bpwfoundation.org>

| Reference | | | |
|---|:---:|:---:|:---:|
| *Generation and Gender in the Workplace,* The Families and Work Institute, http://familiesandwork.org/eproducts/genandgender.pdf - | | ✓ | ✓ |
| *Health and Human Services.* www.hhs.gov/newfreedom/init.html | | ✓ | ✓ |
| *How Can Employers Increase the Productivity and Retention of Entry-Level, Hourly Workers,* James T. Bond, Ellen Galinsky, Families and Work Institute, 2007. http://familiesandwork.org/site/research/reports/brief2.pdf | ✓ | | ✓ |
| *How to Exercise Flexible Work: Take Steps with A Soft-Touch Law,* Levin-Epstein, Jodie, 2005. www.clasp.org/publications/work_life_brf3.pdf | ✓ | | ✓ |
| *Jobs Held by Former Welfare Recipients Hit Hard by Economic Downturn*, Boushey, H. and Rosnick, D., Washington, DC: Center for Economic and Policy Research, September 5, 2003. | | | ✓ |
| *Just Barely Making It: Hardships Experienced after Welfare*, Boushey, H. and Gundersen, B., Washington, DC: Economic Policy Institute, June 2001. | | | ✓ |
| *Leaders in a Global Economy: A Study of Executive Women and Men*, The Families and Work Institute. http://www.familiesandwork.org/summary/global.pdf | | ✓ | ✓ |
| *Millennials Rising-The Next Great Generation*. Howe, N and Strauss, W.,Vintage Books, 2000. | | ✓ | |
| *Model Policy for Employers, WorkLifeLaw.* www.uchastings.edu/site_files/WLL/modelpolicyforemployers.pdf | | ✓ | ✓ |
| *National Study of Employers* – The Families and Work Institute, 2005. http://familiesandwork.org/summary/2005nsesummary.pdf | ✓ | ✓ | ✓ |
| *Health Insurance Coverage in the United States,* Boushey and H., Wright, J., Center for Economic and Policy Research, April 13, 2004. | | | ✓ |
| *Improving Access to Health Insurance,* Boushey, H. and Diaz, M.M., Washington, DC: Center for Economic and Policy Research, April 13, 2004. | | | ✓ |
| *Older Workers: Labor Can Help Employers and Employees Plan Better for the Future,* United States Government Accountability Office. 2005 | | ✓ | |
| *Phased Retirement Overview: Summary of Research and Practices,* Brainard, K., Prepared for the NASRA Phased Retirement Committee, Retrieved July 26, 2005. www.nasra.org/resources/Phased%20Retirment%20Overview.pdf | ✓ | ✓ | |
| *Plunging Employment: Blame Mom?* Boushey, H. and Baker, D., Washington, DC: Center for Economic and Policy Research, June 2, 2004. | | ✓ | ✓ |
| *Raising Profits and Potential:Return on Investment for Work-life Effectiveness, Diversity, Workplace Equity: 2006 National Employer Summit Conference Papers and Discussion Summary,* Business and Professional Women's Foundation, June 2007. www.bpwfoundation.org | ✓ | ✓ | ✓ |
| *Resources and Policy Changes Needed to Create Successful Workplace--Recommendations from 2005's inaugural Workplaces and Workforces in Transition: A National Employer Summit*, Business & Professional Women's Foundation, April, 2006. http://www.bpwusa.org/i4a/pages/index.cfm?pageid=4944 | ✓ | ✓ | ✓ |
| *Responsive Workplaces: The business case for employment that values fairness and families,* Levin-Epstein, Jodie, Center for Law and Social Policy, Reprinted from the Mother Load, a special report in the American Prospect, March 2007. | ✓ | | ✓ |
| *Sloan Work and Family Research Network.* www.wfnetwork.bc.edu | ✓ | ✓ | ✓ |
| *Spain Presents 3rd and 4th Periodic Reports on Compliance with Women's Antidiscrimination Convention,* United Nations, 1999. www.un.org/news/press/docs/1999/19990617.wom.1138.html | | ✓ | ✓ |
| *Starbucks Diversity,* Starbucks, 2002. www.starbucks.com/aboutus/SB-Diversity-Fin.pdf | | ✓ | |
| *TelecommuterHire Savings Calculator.* www.tjobs.com/hiresave.swf | ✓ | | |
| *The Alternative Workplace: Changing Where and How People Work,* Harvard Business Review, Reprint 98301, 1998. | ✓ | ✓ | |

| Reference | | | |
|---|---|---|---|
| http://harvardbusinessonline.hbsp.harvard.edu. | | | |
| *The Status of Telework in the Federal Government 2005,* Office of Personnel Management, 2005. www.telework.gov/documents/tw_rpt05/index.asp | ✔ | | |
| *TimeCare: Workforce Planning*. www.timecare.com | ✔ | | |
| *Work-family Benefits: Which Ones Maximize Profits,* Meyer, C.S.; Mukerjee, S.; Sestero, A., Journal of Managerial Issues, 2001. | | | |
| *Work-life Telework,* U.S. Office of Personnel Management www.opm.gov/employment_and_benefits/worklife/workplaceflexibilities/telework | | | |
| *Workplace Flexibility for Lower-Wage Workers,* Corporate Voices for Working Families, 2006. www.cvwf.org | ✔ | ✔ | ✔ |
| *Workplace flexibility: What It Is and How to Get It,* Gehl, Elisabeth, BusinessWoman Magazine, June 2007. www.businesswomanmgazine.org | ✔ | | ✔ |
| *Workplaces & Workforces In Transition: Briefing Pages for the 2005 National Employer Summit*, Business & Professional Women's Foundation, December, 2005. http://www.bpwusa.org/i4a/pages/index.cfm?pageid=4780 | ✔ | ✔ | ✔ |
| *Step Up, Not Out: The Case for Raising the Federal Minimum Wage for Workers in Every State*, Boushey, H, Bernstein, J. and Rasell, E.,Washington, DC: Economic Policy Institute, 2001. | | | ✔ |
| *Unlawful Disparate Treatment of Workers with Caregiving Responsibilities,* Equal Employment Opportunity Commission, 2005. www.eeoc.gov/abouteeoc/meetings/5-23-07/index.html | ✔ | ✔ | ✔ |
| *U.S. Workers Enjoy Far Fewer Vacation Days than Europeans*, Allegretto, S., Economic Policy Institute, 2005. | ✔ | | |
| *UI is Not a Safety Net for Unemployed Former Welfare Recipients*, Boushey, H. and Wenger, J.B., Washington, DC: Center for Economic and Policy Research, December 4, 2003. | | | ✔ |
| *Washington Voluntary Accounts*, Economic Opportunity Institute. www.eoionline.org/policy_WVA.htm | ✔ | | |
| *Win-Win Workplace Practices: The Study of Improved Organizational Results and Improved Quality of Life*, Reed, P.S. and Clark, S., September, 2004. http://www.choose2lead.org/Research/Publications.asp | ✔ | | |
| *Workplace Flexibility for Lower-Wage Workers,* Corporate Voices for Working Families, 2006. www.cvwf.org | ✔ | ✔ | ✔ |

## *Opening Discussion Speakers*

**Sheila Barry-Oliver**, Ed.D., is Board of Trustees, Chair, Business & Professional Women's Foundation. She has been a member of BPW since 1979. Barry-Oliver is an assistant professor in the School of Professional Studies at Trinity College teaching management courses, as well as on the faculty of the business school at George Washington University. Previously, she spent 28 years in the corporate sector, most recently as the Director of the global workforce initiative at Booz, Allen & Hamilton and previously as an information technology leader with four professional services firms.

**Katie Corrigan** is Co-Director, Workplace Flexibility 2010, Georgetown University Law Center, where she shares the responsibility for overseeing the strategy, legislative lawyering, policy research, media, and constituent outreach components of the effort. She began working with Workplace Flexibility 2010 as Assistant Director of the Georgetown University Law Center's Federal Legislation Clinic. Prior to working in the Clinic, Corrigan was a legislative counsel at the American Civil Liberties Union. Before joining the ACLU, Corrigan worked as counsel on disability policy for Senator Tom Harkin on the Senate Health, Education, Labor and Pensions Committee and as a Teaching Fellow at Georgetown's Federal Legislation Clinic.

**Deborah L. Frett**, CEO of the Business and Professional Women's Foundation and BPW/USA, has more than 27 years of experience in providing and implementing strategic direction and executive management for associations, for-profit and non-profit organizations. Ms. Frett has also served as executive director for the online start-up, SeniorNavigator, a public-private partnership initiative with the Virginia Health Care, AOL Time Warner and CollisWarner Foundations. This internet-based program links families and caregivers with a wide range of essential information on health, legal, financial, and housing issues.

**Lisa Hershman** is Avnet, Inc.'s Global Vice-President of Operational Excellence and Quality. She also serves the company as the first Chairwoman of Avnet's global Executive Women's Forum. Ms. Hershman joined the Avnet, Inc. team in a newly created position to lead the global Operational Excellence initiative. With the professional demeanor of a television anchor, which she once was, combined with the technical prowess of an engineer, which she is, her unique blend of communication skills and knowledge has been a hallmark of her success.

**Toni-Michelle Travis**, Associate Professor of Government and Politics for George Mason University, co-authored *The Meaning of Difference,* which examines American constructions of race, gender, social class, and sexual orientation. She has taught and conducted research on urban politics, state and local politics, and American government. She has served as a political analyst on Virginia and national politics on C-Span, CNN, Fox Morning News, and the local ABC, CBS, NBC affiliates.

**Muriel Watkins** is the Vice President of Human Resources for the New York Times. As a masthead executive of one of the world's leading news organizations, Ms. Watkins will speak on the informal and formal practices in effect at the New York Times that help make it a successful workplace.

## *Small Group Discussion Speakers*

| Work-life Effectiveness Track Speakers | |
|---|---|
| Voluntary Practice Table<br><br>Topic: Raising employer profits and employee potential…what is the true impact of work-life effectiveness?<br><br>John Wilcox, Deputy Director, Corporate Voices for Working Families*<br><br>Jodi Levin-Epstein, Deputy Director, Center for Law and Social Policy<br><br>Nina Madoo, Director of Workplace Strategies, Diversity & Workplace Effectiveness, Marriott International, Inc. (2006 Fortune 500 Company)<br><br>"*" indicates lead table facilitator | Policy Table<br><br>Topic: What policy or government programs exist that impact work-life effectiveness options? Overview of key policy areas or government programs related to work-life effectiveness and what is in development by policymakers, advocates, or employers.<br><br>David Gray, Director of the Workforce and Family Program, New America Foundation *<br><br>Kaitlyn Kenney, Policy Research Consultant, Workplace Flexibility 2010, Northeastern University<br><br>Karen Furia, National Office Coordinator, Department of Labor-Women's Bureau |

| Diversity Track Speakers | |
|---|---|
| Voluntary Practice Table<br><br>Topic: What are employers and others doing to adapt to and engage diverse work populations? What are the benefits, challenges and strategies?<br><br>John Lancaster, National Council on Independent Living, Executive Director.<br><br>Jennifer E. Swanberg, Ph.D., Associate Professor, University of Kentucky<br>Executive Director, Institute for Workplace Innovation* | Policy Table<br><br>What is the government's role in supporting employers' diversity efforts that take into account the rapidly changing demographics of the American workforce? Can the government set policy or create guidelines to facilitate employers' practices impacting hiring, retention and advancement of minorities, persons with disabilities, older workers, etc.?<br><br>Jane Kow, Employment Law Advice, HR Consulting, and Management Training; Diversity Fellow to American Bar Association General Practice, Solo and Small Firm Division, 2006-2007, Jane Kow & Associates*<br><br>Sarah Pierce, Senior Legislative Representative of Congressional Relations & Political Affairs, AARP<br><br>Chantel Sheaks, Legislative Counsel for Tax and Benefits, Workplace Flexibility 2010 of Georgetown University Law Center |

| Workplace Equity Track Speakers | |
|---|---|
| Voluntary Practice Table<br>Topic: What are the differing perspectives on ensuring workplace equity and what are the latest on outcomes for employers that strive to create equitable workplaces?<br><br>Lois Backon, Vice-President, Families and Work Institute*<br><br>Dr. Ellen Daniel, scientist, speaker, writer of *Every Other Thursday, Stories and Strategies From Successful Women Scientists*<br><br>Lisa Hershman, Global Vice-President of Operational Excellence and Quality and first Chairwoman of Avnet's global Executive Women's Forum, Avnet, Inc. (Fortune 500 Company) | Policy Table<br>Topic: What is government's role in supporting workplace equity efforts for workingwomen, in theory and in practice? What does this mean for employers and the workplace?<br><br>Heather Boushey, Senior Economist, Center for Economic and Policy Research<br><br>Shirley Clark, Founding Partner, Choose2Lead Women's Foundation*<br><br>Judith Finer-Freedman, Founder, WorkLife Juggle |

## *Participating Organizations*

The Arc & UCP, Washington, DC, www.ucp.org and www.thearc.org
AARP, Washington, DC , www.aarp.org
AARP Foundation, Falls Church, VA, www.aarp.org/about_aarp/aarp_foundation/
Adami, Lindsey & Company, LLP, Sherman, TX, www.adamilindsey.com
Avnet, Inc., Phoenix, AZ, www.avnet.com
BPW Foundation, Washington, DC, www.bpwfoundation.org
BPW/USA, Washington, DC, www.bpwusa.org
Brubaker Seminars, Laurel, MD
Canyon Consulting, Albany, MO
Carol Ann Huber, Personnel Financial Planner, Voorheesville, NY
Cate Bower Communications, West River, MD, http://www.tecker.com/CateBower.php
Center for Economic and Policy Research, Washington, DC, www.cepr.net
Center for Law and Social Policy (CLASP), Washington, DC, www.CLASP.org
Center for Minority Veterans, Washington, DC, http://www1.va.gov/centerforminorityveterans/
Center for Women Veterans, Arlington, VA, http://www1.va.gov/womenvet/
Ceridian Government Solutions, Arlington, VA, www.ceridian.com
Choose 2 Lead Women's Foundation, Oakton, VA, www.choose2lead.org
Corporate Voices for Working Families, Washington, DC, www.cvworkingfamilies.org
Department of Labor-Women's Bureau, Washington, DC, http://www.dol.gov/wb/
Discovery Communications, Inc., One Discovery Place, Silver Spring, MD, www.discovery.com
Ellen Daniell, Scientist, Speaker, Author, Oakland, CA
Families and Work Institute, New York, NY, www.familiesandwork.org
Fannie Mae, Washington, DC, www.fanniemae.com
George Mason University, Fairfax, VA, www.gmu.edu
Ginnie Mae, Washington, DC, www.ginniemae.gov
GlobalNet GNP, Midland, MI
Golden Ventures, Fort Smith, AR, www.GoldenVen.com
Hinrichs Marketing Consultants, Saint Louis, MO
Integrated Compliance Solutions, Moorestown, NJ, www.icscompliance.com
Jane Kow & Associates, San Francisco, CA
Jeremiah Housing, Inc., Randallstown, MD
Karen Noble, WFD Consultant, Newton, MA
KPMG LLP, McLean, VA, www.kpmg.com
M.I.T. Workplace Center, Cambridge, MA, http://web.mit.edu/workplacecenter/
Marriott International, Inc., Washington, DC, www.marriott.com
National Association of Mothers Centers, Kensington, MD, www.motherscenter.org/
National Council on Independent Living, Washington, DC, www.ncil.org
National Institute of Health—Work Life Center, Bethesda, MD ,
http://osmp.od.nih.gov/Divisions/Workforce/WorkLifeCenter/
New America Foundation, Washington, DC, www.newamerica.net
Office of Disability Employment Policy (DOL), Washington, DC, www.dol.gov/odep/
Office of Personnel Management, Washington, DC, www.opm.gov
Office of Senator Hillary Rodham Clinton, Washington, DC, www.clinton.senate.gov
Office of Senator Kennedy, Washington, DC, www.help.senate.gov
OraMedica International, LLC, Glenside, PA, www.oramedica.com
Orange County Chamber of Commerce, Newburgh, NY, www.orangeny.com
Oshkosh Office Systems, Appleton, WI
Pennridge School District, East Greenville, PA
Rutgers University and CDWW, Washington, DC, www.rci.rutgers.edu
Sextant Consulting, Inc., Half Moon Bay, CA, www.sextant-cons.com

Talbott & Associates, Kansas City, MO
Target Corporation, Pueblo, CO, www.target.com
The New York Times, New York, NY, www.nytimes.com
Total Tax Service, Bowie, MD
Trinity (Washington)College, Great Falls, VA
University of Kentucky/ Institute for Workplace Innovation, Lexington, KY , www.uky.edu
Women's Edge Coalition, Washington, DC, www.womensedge.org
Work Life Performance, Inc., Bethesda, MD, www.worklifeperformance.com
Workforce Management, Washington, DC, www.workforce.com
Worklife Juggle, Toronto, Ontario, Canada
Workplace Flexibility 2010 Georgetown University Law Center, Washington, DC ,
http://www.law.georgetown.edu/workplaceflexibility2010/index.cfm
YWCA-Orange County, New Windsor, NY, www.ywca-orangecty.org