Better Balance, Better Business

Options for work-life issues

Alberta
HUMAN RESOURCES
AND EMPLOYMENT

the people
& workplace
department

The book is for employers and managers who are interested in learning more about how pressures at work and away from the worksite combine to affect the business operation, and what can be done to improve the situation.

It will help you:

- understand what work-life balance means—the relationship between work and society

- understand why the issue of work-life balance is important to the for-profit and not-for-profit working community

- explore how work-life issues might affect business goals

- acquire the knowledge needed to help you assist your workers in managing to work-life pressures

- consider a variety of practical options for your workplace

- apply the tools to create a useful plan for your organization

- connect with further information and resources.

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Better Balance, Better Business

Options for work-life issues

Successful business leaders do more than just balance the books — they also help their employees to balance work-life issues.

Better Balance, Better Business makes the case that work-life balance is a serious and growing concern for employers, and business owners and managers who find ways to help workers have a life *and* a job will reap real rewards in terms of employee recruitment, retention, morale and productivity.

Whether your company is small or large, formal or informal, very personal or policy-driven, there is something you can do about work-life balance. This publication provides you with a wide range of options, from flexible attitudes to flexible work schedules, from easy, common-sense strategies to complex plans. Are you looking for ideas and suggestions? Extensive lists, step-by-step guidelines, samples and solid references are provided. Quick, common sense ideas are here as well. Tips, tools and testimonials from Alberta employers round out a complete package of how to help you achieve better business through better balance.

There is another important related issue to keep in mind when considering the employment needs of employees. In addition to the business case for flexibility, employers should be aware that they also have a legal duty to accommodate various aspects of an employee's life such as family status, religion, disability and gender (including pregnancy) based on Alberta's human rights legislation, the *Human Rights, Citizenship and Multiculturalism Act*. Employers are required to accommodate up to the point of "undue hardship." For more information about the duty to accommodate and undue hardship, contact the Alberta Human Rights and Citizenship Commission at (780) 427-7661 in Edmonton or (403) 297-6571 in Calgary. To call toll-free, dial 310-0000 and then enter the telephone number. Visit the Commission's website at www.albertahumanrights.ab.ca

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- *Canadian Federation of Independent Business*
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- *Human Resources Management Association of Edmonton*
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The Business Case for Balance

What is work-life balance?

There just aren't enough hours in the day. I hold down a full-time job. I help care for my grandchildren and my parents, who need more help every year. Time for "me" is pretty hard to come by.
—*Retail department store manager, Calgary*

Working on my master's degree, teaching part-time, being a single mom, trying to stay active and physically fit, making time for family commitments…balance is almost impossible to maintain.
—*Instructor, post-secondary institution, Lethbridge*

They downsized the staff but they never downsized the work. I'm doing work that two people used to do.
—*Computer programmer, Edmonton*

If you are an employer, you've probably heard these kinds of statements before. Maybe your own employees have said them! Work-life balance—managing competing roles and responsibilities at work, at home and in the community—is a moving target many Canadians are having a hard time hitting. Driven by complex changes in work and society, a growing number of workers are reporting the "struggle to juggle." Whether the challenge is on the life side of the equation, on the work side, or on the sum total of "way too much to do and not enough time to do it," finding ways to manage work-life conflict is important.

What does this mean for you? As an employer, you hold at least some of the keys to work-life balance for your employees. This book makes the case that supporting work-life balance for employees makes good business sense, with proven, bottom-line benefits for yourself, your employees and your company.

Consider this. In the last decade:
- High job stress has doubled.
- High job satisfaction and employee loyalty has dropped.
- The percentage of Canadians working more than 50 hours a week has grown from 10 per cent to 25 per cent.
- Most working Canadians live in dual-income families and have dependents, whether children, aging parents or both.
  —*Health Canada 2001 National Work-Life Conflict Study*

- Fifty-three per cent of Albertans report being "very stressed," the highest percentage in Canada.
  —*Angus Reid Survey for Aventis Pharma Inc., 2000*

- Forty-seven per cent of Canadians report moderate to high levels of stress resulting from work-life conflict, up from 26 per cent in 1989.
- Fifteen per cent of Canadian employees are in the sandwich generation, caring for both children and an older relative.

—Work-Life Compendium 2001

It's not my problem: Eight misperceptions

A serious discussion of work-life balance can be sidelined by one of several false interpretations of the problem. Check your own assumptions by reading the following information, which will help you to separate fact from fiction.

Perception: *It's a private issue.*

Fact: The personal impact is undeniable: research links work-life conflict to increased depression, marital problems, fatigue and stress-related illnesses. But it doesn't stop there. These results translate into real problems for employers, such as increased absenteeism and reduced productivity. Studies show a significant public cost as well—one 1999 Health Canada study estimated that additional annual expenditures to Canada's health care system resulting from work-life stress is in the range of $425 million.

> *It's a business issue. It's a dollar maker or breaker. If an employee is stressed, tired, overworked, or living with tension in their home life, then this creates tension in the workplace for employees and business dollars go down the tube.*
>
> *—Business owner, electrical contractor, Edmonton*
>
> *If my employees aren't happy, my customers aren't happy.*
>
> *—Restaurant manager, Calgary*

Perception: *It's a parenting issue.*

Fact: Work-life conflict is a growing concern for all Canadians, not just those with children at home. An increasing number of non-parents report difficulty fitting in volunteer commitments, or educational, leisure or health pursuits. We may not all be parents but we are all children: one in four Canadians now cares for an elderly family member, up from six per cent a decade earlier (Conference Board of Canada, 1999).

Perception: *It's a women's issue.*

Fact: According to a 2003 study by the Women's Executive Network, women are twice as likely as men to report work-life imbalance, and with good reason: despite a massive influx into the workforce, women retain the greater share of responsibility for child care, elder care and domestic chores (Work-Life

Compendium 2001). However, a recent trend has seen levels of work-life conflict rise among men. In fact, men are more likely than women to point to work pressures as the cause of the imbalance, according to the Women's Executive Network study.

Perception: *It's a stage in life.*

Fact: The call for more work-life balance comes from all sections of the population: the university student with a part-time job, the female executive with small children and the seasoned employee easing into retirement. Work-life balance is increasingly important to young people entering the labour market as well: in a Royal Bank survey of university students in 2000, 70 per cent indicated they would choose a job that accommodated work-life interests over one that offered long hours but "a lot more money."

Perception: *It's "fifty-fifty."*

Fact: Work-life balance is rarely a partnership of equals. More often, it is a changing relationship—one part may dominate for a period of time, only to see the other part attracting more attention. Balance is also personally defined: what is balance to one person may be imbalance to another.

Perception: *Work and life are separate domains.*

Fact: Work and life issues are closely linked and changes in one almost always affect the other.

Perception: *Technology will help.*

Fact: Technology is a double-edged sword. While innovations such as cell phones, laptops, personal digital assistants and wireless networks allow us to work anywhere, they also allow work to follow us anywhere. Seventy-two per cent of Canadians believe technology is increasing their workload (National Work-Life Conflict Study, 2001).

> *The work is always there. You take your laptop on the plane. You can always be reached through e-mail, cell phones, pagers, etc. Technology just adds to the potential of what work can be done and where and when you can do it.*
> —*Employee assistance program consultant, EAP services company, Calgary*

Perception: *Little can be done.*

Fact: Companies have been able to show clear and measurable improvements in work-life balance by even the smallest of changes. Of course, there is no "magic bullet," but a willing manager or owner has plenty of tools and resources to achieve better balance and, through it, better business. A growing number of Canadian employers are seeing it this way, reporting increases in flexible work arrangements such as flex-time, job sharing, telework and compressed workweeks.

> *We have hard measures to say work-life balance strategies make a difference. Our sick time is down from 3.5 per cent in 2001 to 2.1 per cent. Our overtime is down from 1.75 per cent to one per cent. Our staff turnover is eight per cent—lower than the industry average of 12 per cent. Our WCB work severity rating has gone from 633 to 173—a huge drop. I attribute all of these changes to the work we've done with wellness issues and to the philosophy of management that it matters how you treat people.*
>
> *—Administrator, long-term care facility, Airdrie*

What's in it for employers?

As a person, you might agree that work-life balance is a worthwhile goal. But as a business owner or manager, you may need more reasons than that to build it into your business plan. A tight labour market is one very compelling reason: in Alberta, where 22 out of 53 occupations are reporting labour shortages, your company will increasingly have to compete for the best employees. Studies show that an organization's ability to attract and retain workers will increasingly depend on work-life balance. According to the Future of Work 2003 study, the top five most important issues for employees in 2013 will include flexible employment policies compatible with lifestyle needs of employees.

Costly consequences

Study after study confirms it: work-life conflict costs Canadian organizations plenty. Canadian employers have consistently reported that work-life conflict has resulted in:

- increased absenteeism
- increased employee turnover
- reduced productivity
- increased disability costs
- increased health costs
- reduced job satisfaction
- increased managerial stress
- impaired family/social relationships.

Here are just a few statistics to drive home this point:
- Work-related absences cost Canadian business just under $3 billion a year in direct costs alone.
- Absences due to work-life conflict have doubled in the past decade.
- Workers with high work-life conflict miss twice as many workdays as those with moderate conflict and three times that of workers with low conflict.
- One in three employees have turned down or chosen not to apply for a promotion because of work-life conflict.
- The cost to recruit a new staff person has been estimated at one to three times the annual salary of that position.

—Work-Life Compendium 2001

- Mental health concerns are the fastest growing category of disability costs in Canada.

—Canadian Business and Economic Roundtable on Mental Health, 2000

All of these outcomes have direct consequences for your business, but they also have direct and personal consequences for you, as a business owner, a manager or a supervisor. Work-life stressors for your staff mean increased work-life stress for you and those around you.

If there is an imbalance, it reflects on work performance, customer service, team dynamics, staff morale and attitude.

—General manager, hotel, Rocky Mountain House

The bottom line is we pay for out-of-balance work life. There is more and more pressure through union negotiations to address these issues and employees want more help.

—HR director, long-term care facility, Edmonton

Bottom-line benefits

Companies with high levels of employee satisfaction know that work-life balance options are not "perks." They are part of a business strategy that provides a solid return on investment for the company as well as the workforce. In recent surveys, companies across Canada have reported that work-life balance programs have helped them to:

- **Reinforce recruitment.** Studies show work-life balance is one of the benefits employees are looking for in a job, providing a competitive edge in a tight labour market.

What workers consider "very important" in a job, Canada, 2000

Source: CPRN-Ekos Changing Employment Relationships Survey 2000 (n=2500).
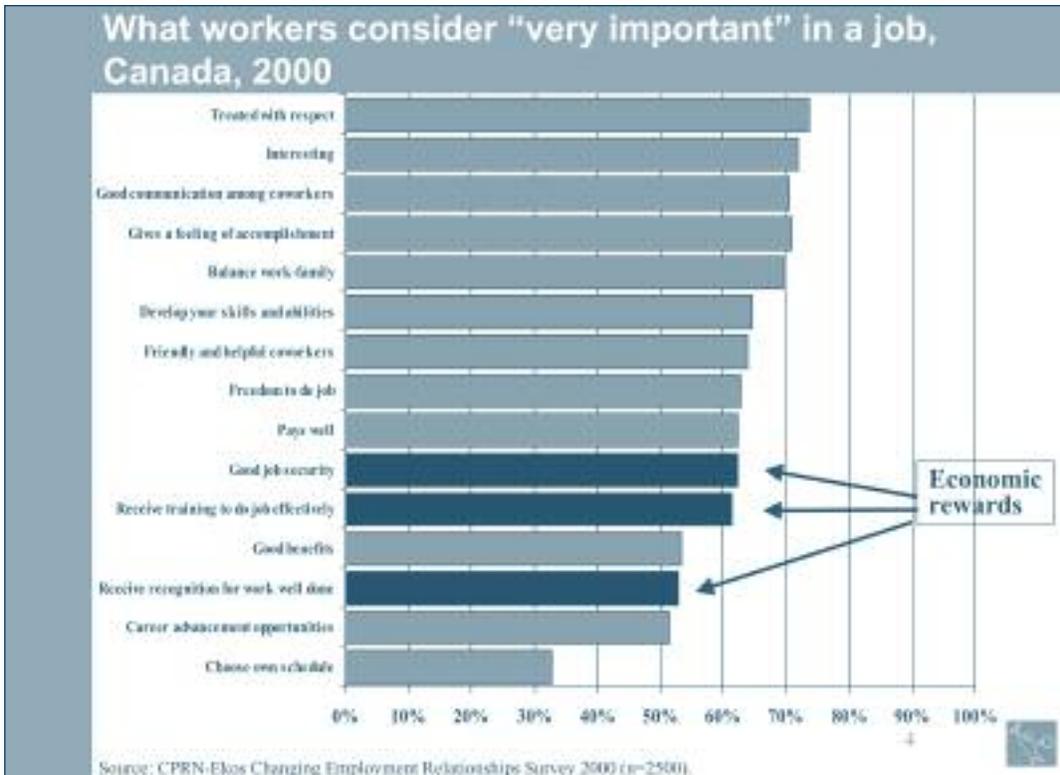
Graham Lowe, *Job Quality the Key to Attracting, Retaining and Developing Workers of All Ages*. Canadian Policy Research Networks and the University of Alberta. Keynote address to IPMA Canada, National Training Conference, Fredericton, NB. May 16, 2001. Used with permission. Posted at: www.cprn.org/en/doc.cfm?doc=202

- **Raise retention.** The majority of companies reported improved retention as an outcome of work-life balance programs.

- **Decrease absenteeism.** An overwhelming majority of companies reported that flexible working arrangements have reduced absenteeism.

- **Limit latecomers.** Companies reported reduced instances of employees arriving late for work as a result of flex-time options.

- **Power up productivity**. Companies reported significant gains in productivity after implementing work-life balance programs.

- **Neutralize the naysaying.** Work-life balance strategies produce gains in employee satisfaction surveys, customer service evaluations and relationships among colleagues.

- **Promote participation in training.** Studies show employer support of work-life balance allows and encourages greater participation in training and education.

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- **Contend with the competition.** More than half of companies offer some form of flexible working arrangements, up from 11 per cent in 1987 and 33 per cent in 1993 (Work-Life Compendium 2001).

- **Engage the emerging labour market.** The majority of high school and university students name work-life balance as a personal goal.

I started in this business in 1978. There were days I'd work until 4 a.m., going in weekends, going for broke all the time. Young people coming out of university now don't want to do that, and that's good. They've seen their parents be completely devoted to companies and then get laid off. These graduates are more selective in what they want to do and I say, "Come work for us. We'll give you good, meaningful work but we'll respect your desires and needs."

—Partner, accounting firm, Edmonton

How does your organization measure up?

There are some excellent tools available to help you place your organization on the work-life balance sheet. Human Resource Development Canada's website *Work-Life Balance in Canadian Workplaces* offers a wealth of information, sample policies and case studies, as well as two practical tools that can help you benchmark where you are and where you need to be:

- *The Work-Life Continuum* is a description of five developmental milestones in work-life culture change.

- *The Checklist for Employers* is a series of statements to measure progress in developing, implementing, or communicating work-life balance in your organization.

Workable Options

Formal work-life balance programs may not be necessary in your workplace. If you know your workers, listen to their needs, and try to be responsive and flexible, you are already doing a lot to help them. This is especially true for small businesses. Recent research for the Canadian Federation of Independent Business and Scotiabank found that employees in small and medium-sized business gave the highest levels of satisfaction to: their firm's level of flexibility for personal needs, relationships among employees, relationships between managers and employees, and the work ethic (CFIB and Scotiabank, October 1999).

This section presents a quick overview of work-life balance options that you might consider, along with some pros and cons and suggestions for best practice. Remember to consider each option carefully in light of employment standards and collective agreements, if your employees are represented by a union. Then turn to the Build-Your-Own Balance Plan section that follows this one to learn how you can put your plans into action.

Flex the time

Flex-time arrangements are a broad category of work-life balance options that focus on the element of time: the days, hours, start time and end time of work. Included within this category are alternative work schedules, compressed workweeks and voluntary part-time or reduced hours.

Alternative work schedules

Employees work a full day but can vary the start and end of the workday within defined guidelines. There is usually a "core" of work hours when all employees are expected to be present. For example, one employee arrives at 7 a.m. and leaves at 3 p.m. while another arrives at 9 a.m. and leaves at 5 p.m., but both are there for the core hours of 10 a.m. to 2 p.m.

> Flex-time schedules are the most prevalent work arrangement, available to over one-third of employees.
>
> —*Statistics Canada, 2003*
>
> Flex-time schedules have been associated with a 15 per cent reduction in average time lost from work.
>
> —*Work-Life Compendium, 2001*

The upside

- Employees can fit work around personal commitments.
- Employees can work at times when they are at their "personal best."
- Alternative work schedules can improve coverage or access for customers, co-workers on different shifts or business partners in other time zones.
- Access to computer networks (or the office copier!) is easier outside of peak periods.

The downside

- The depth of coverage (number of people available at one time) may be reduced.
- Scheduling meetings can be more difficult.
- There may be periods when the supervisor is not present.
- This option is not suitable for all positions or operations (e.g. assembly line work).

Positive practices

- Identify core hours when all employees must be present.
- Specify start/end times for the employee and communicate these to co-workers.
- Require that all meetings be held during core time.
- Clarify how overtime is handled, defined in light of the flex-time schedule.
- Allow a trial period and make adjustments as needed (e.g. adjust core time hours, rotate start times between employees wanting the same shift).

> *The reason I stay at this job is the flexibility in the hours. I am not a morning person and I do better work when the office is less busy, so I come in at 11 a.m. and stay late. That's my preference—I am a single woman and those are the hours I want to keep. We both benefit—I get some control over my schedule and they get my most productive hours.*
> *—Bookkeeper, modelling agency, Calgary*

Compressed workweek

Employees work the full number of hours in their regularly scheduled workweek or cycle, but these hours are compressed into fewer days. For example, an employee working one extra hour a day earns approximately one day off in every two-week cycle; an employee adding a certain number of minutes to each workday receives every third Friday off.

The upside

- Employees can arrange for personal needs (e.g. banking) on their day off.
- Employees save time and costs in commuting, parking, lunches, office wear and child care.

- Employers may be able to extend hours of service to customers.
- Employers may save overtime costs.

The downside
- This option may not be suited for work that is physically demanding or stressful.
- Productivity of longer workdays may not be equal to more days of shorter duration.
- Public transportation and child care may not align with alternate hours.
- Calculating vacation and sick days is more complicated.

Positive practices
- Establish staggered or overlapping shifts to ensure needed coverage (e.g. one shift works Monday to Thursday, the other shift works Tuesday to Friday; two eight-hour shifts plus a skeleton night shift).
- Ensure compliance with provincial employment standards before setting longer hours.
- Set a trial period to evaluate impacts on employee satisfaction and productivity.

> *Next year, instead of taking the annual raise, I am going to go down to four days a week. This will work better with my lifestyle and wanting to fit in other things that are important to my life—gardening, cooking, seeing my family.*
>
> *—Operations manager, restaurant, Calgary*

Voluntary part-time/reduced hours

Voluntary part-time or reduced hours means employees choose to work less than full-time on a company's regular payroll. These arrangements may be temporary or permanent or may be set to accommodate the personal needs of employees.

> Seventy-three per cent of part-time employees say they are so by choice.
>
> Seventy per cent of part-time employees are women.
>
> Female part-time workers are twice as likely as their male counterparts to have completed university or college.
>
> *—National Work-Life Conflict Study, 2001*
>
> Only 17 per cent of part-timers had received a promotion at any time.
>
> *—Statistics Canada, 2003*

The upside
- Employees have more time to manage personal commitments.
- Part-time employees report higher levels of job satisfaction and work-life balance.
- Employers may be able to recruit or retain employees who do not want full-time work.

The downside
- Some jobs are not well suited for part-time work.
- Part-time employees may be viewed as less committed, be left "out of the loop" or overlooked for promotion.
- There may be a danger of reducing the hours without reducing expectations or workload.
- Customers may find that part-time access to this employee is inconvenient or confusing.

Positive practices
- Choose a reasonable schedule to accommodate peak workloads, regular staff meetings and natural breaks in workflow.
- Avoid complex work schedules that may be difficult for others to track or remember.
- Put the hours in writing and inform all affected co-workers and customers.
- Provide proportional pay and benefits and seniority rights.
- Treat part-time employees equally (e.g. they are considered for promotions, invited to staff functions).

> *We have a journeyman part-time. He needed to juggle with his spouse's hours so he works flex hours and two to three days a week. He's such a valuable employee that we're willing to allow him a flexible arrangement. He's happy and we retain a valuable employee.*
> —*CEO, electrical contractor, Edmonton*

Phased-in retirement

Individuals retire gradually by reducing their hours over a period of time, often years, prior to retirement. This benefit is usually reserved for long-service employees and is being negotiated in an increasing number of collective agreements. Plans can take many forms, including company-paid, employee-paid or partial pension options.

The upside
- Older workers have time to prepare for the changes that come with retirement.
- Employers can plan for attrition.
- Employers can continue to benefit from the skills and expertise of older workers.
- Employee-paid and partial pension programs are relatively inexpensive for employers.

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The downside
- Company-paid programs are costly for employers.
- This option requires careful planning and management of benefits.

Positive practices
- Set and document a timeframe for the employee's retirement.
- Provide pre-retirement planning courses for the retiree.
- Allow employees to transition into less stressful jobs, if desired.
- Offer temporary or relief work or short-term contracts to retirees.

Flex the place

Technological innovations have resulted in a wide range of options for working from home, from satellite offices or from remote locations, all collectively known as telework.

Telecommuting

Telecommuting involves doing regular work from home. This arrangement may be permanent or temporary, part time or full time or a set portion of the workweek. Telecommuting usually relies on communications technology like a telephone, fax machine or home computer linked to the main office.

The upside
- Employees can adjust their work schedules to accommodate personal needs.
- Employees save time and costs in travel, parking and personal expenses.
- Many telecommuting workers show increases in productivity as they find fewer distractions or interruptions working at home.
- Employers may be able to save on office space and operating costs.
- Employers can broaden the recruitment pool or employee base to include people who cannot or do not want to commute to work.

The downside
- Some work is not well suited to telecommuting.
- Some employees are not well suited to telecommuting (e.g. people who do not work well independently, "workaholics" who find it difficult to leave the work alone, "people persons" who would find this too isolating).
- Some home environments are not well suited to telecommuting (e.g. homes with pre-school children or homes without adequate workspace may be problematic).

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- This option may have a negative effect on teamwork, team spirit or a sense of belonging.
- Employers may find scheduling meetings, training or distributing the workload more challenging.

Positive practices
- Check out insurance coverage and liability issues, including WCB requirements.
- Identify required equipment and supplies and how they will be provided, monitored and maintained.
- Define occupational health and safety requirements (e.g. ergonomic work stations, lighting) and how these will be assessed and assured.
- Identify security and confidentiality requirements for work documentation.
- Ensure long-term dependent care is in place.

> *We are moving more formally to home office environments for faculty. Staff members save travel time, they are able to accomplish more and flexibly juggle work-life issues. It also helps with recruitment—we can recruit from a greater base.*
>
> *—Human resources director, post-secondary institution, Athabasca*

Flex the job

Maybe the job itself needs to change, not just the time allocation. "Flexing the job" involves a basic reconsideration of how you define what a job is and how you divide these tasks into different job categories. Is there another way you could divide up the work tasks? Can you re-cluster and repackage responsibilities to create more balanced work assignments? Job redesign or job sharing are two options to consider.

Job redesign

Job redesign focuses on changing the job responsibilities or processes significantly in order to achieve a more balanced set of responsibilities. Job redesign requires a careful look at job tasks, expected results and how you measure success.

The upside
- This option challenges the assumptions, encourages creative problem-solving.
- A wide range of options can be considered.
- This option can get at the underlying reasons for job stress.

The downside
- This can be a time-consuming process.
- It requires specific (possibly external) skills in job analysis and redesign.
- Employees may be resistant to change.

Positive practices
- Make it a collective undertaking, involving workers, co-workers, union representatives and customers—everyone who would be impacted by the change.
- Analyse the job tasks, including where, how, with what or with whom the work is done.
- Define the expected results of the job and how you will measure success (e.g. quantity, quality, speed, revenue).
- Identify different (and creative!) alternatives for when, where and how these objectives might be realized.
- Compare a cluster of similar jobs, looking for opportunities and cost-efficiencies by redistributing work assignments.

Job sharing

Job sharing is a form of permanent part-time work where two people share the responsibilities, hours, salary, and benefits of one full-time job. The split may be equal (50-50) or another combination (e.g. 60-40) or it may alternate (e.g. three days one week, two the next). Common configurations are morning/afternoon splits, half-week splits (Monday to Wednesday noon, Wednesday noon to Friday afternoon) or alternating weeks. Compensation and benefits are split according to the percentage of full-time hours worked by each employee.

The upside
- This option widens the employer's base of potential employees.
- Job sharers report higher levels of job satisfaction and work-life balance.
- It may offer the benefit of greater combined skills and expertise (e.g. "two heads are better than one").
- The employer is able to share office space and reduce overhead costs.

The downside
- Job sharers have to settle differences in work styles and standards.
- Training benefits or stipends may have to be shared (leaving less for each partner).
- The employer has increased time or costs in supervising two employees.
- Clients or customers may not want to be shared.

Positive practices
- Ensure partners respect and trust each other, communicate and collaborate well.
- Establish tools and processes for clear communication (e.g. logbooks).
- If possible, have both partners keep to a regular schedule.
- Plan for some overlap time for planning and co-ordinating.
- Ensure co-workers and clients are informed of the arrangement.
- Define how vacations, holidays and sick leave will be handled.

Flex the benefits

One-size-fits-all benefit packages are not well suited to a diverse workforce. Offering a range of benefit options and flexibility in selecting the employee's preferred choices or the amount of coverage allows employees to create a personalized package tailored to meet individual needs and wants.

Leaves

This is a very broad category that includes a wide range of options for taking job-protected time off from work, some of which are legally required, such as vacations and maternity leave. Leaves may be paid, unpaid or self-funded and are negotiated as part of a collective agreement or established by the employer. In some situations, Employment Insurance benefits may be available to an employee on leave. Typically, leaves are formal arrangements and may form part of the employment contract. Examples of leaves include:

- **Bereavement Leave**—granted to an employee for bereavement following the death of a family member.

- **Compassionate care leave**—for employees to provide care to a gravely ill or dying spouse or common-law partner, child or parent that has a significant risk of death within six months. Employees can access Employment Insurance benefits for compassionate care leave provided they are eligible.

- **Extended leave**—granted to an employee for an arranged, extended leave.

- **Maternity leave**—birth mothers employed for 52 consecutive weeks with the same employer are entitled up to 15 weeks of job-protected leave. Employees can access Employment Insurance benefits for maternity leave provided they are eligible.

- **Parental leave**—birth mothers, fathers and adoptive parents employed for 52 consecutive weeks with the same employers are entitled up to 37 weeks of job-protected leave. Employees can access Employment Insurance benefits for parental leave, provided they are eligible.

- **Personal leave**—time off for personal reasons. Most employers limit the number of personal days per year.

- **Professional development leave**—time off to take work-related courses.

- **Self-funded leave**—the employee volunteers to receive a reduced salary for a period of time in exchange for a leave from work without loss of position or benefits. For example, an employee receives 80 per cent of his or her salary for four years and takes the fifth year off also at 80 per cent salary.

- **Sick leave**—time off when an employee is ill. Employees can access Employment Insurance benefits for sick leave provided they are eligible.

The upside
- There is a broad range of leave options to consider.
- Options can closely target individual employee needs.
- References and sample policies are readily available.

The downside
- There are cost implications.
- It requires careful negotiation and definition.
- It may be time-intensive to negotiate terms.

Positive practices
- Employees could pool or donate hours for the benefit of a co-worker in need.
- Employees could self-fund employment benefits while on extended leave.
- Employees may use sick days to care for a sick child.
- Employees may take a certain number of personal days with "no questions asked."
- Employees may take time off in lieu of overtime.

We've taken a flexible approach in our collective agreement to allow for principals and employees to work out individual needs in the most appropriate way. For example, there are no set days written into the agreement on the number of days provided for critical illness and bereavement. This way they can work this out based on needs and requests.

—*Director, public school board, Edmonton*

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> *We have a personal leave program where employees can take up to six months of unpaid leave. In our business we have a large ethnic base of employees and a lot of them have parents who live off-continent. This extended leave allows them the time needed to visit parents or extended family.*
>
> —*Partner, manufacturing company, Edmonton*

Dependent care

This category focuses on employees who support dependents, typically dependent children or elderly relatives. It includes a range of options such as on-site child care, emergency child care or elder care, information and referral services or financial assistance for dependent care.

> **Up to 90 per cent of care needs for the elderly are addressed by informal caregivers such as family and friends, who often require time away from their jobs.**
>
> —*Health Canada, Commission on the Future of Health Care in Canada, 2002*

The upside
- On-site child care can cut commuting time and allow employees to see their children during breaks.
- Emergency child care can meet employee's needs when the child or caregiver is ill.
- Information and referral services can save considerable time and stress for employees.

The downside
- On-site child care can require considerable start-up and operating costs.
- Some worksites are not ideal environments for child care services.
- Some employees prefer to have family members or friends provide dependent care.

Positive practices
- Provide as broad a benefit as possible (e.g. include dependent care or elder care instead of just child care).
- Allow employees as much choice as possible (e.g. financial subsidy provided and the employee chooses the caregiver, subject to approval).
- Provide a range of options, in combination if possible (e.g. referral services and financial support).
- Provide or contract for dependent care in emergency or special circumstances (e.g. school holidays).

Most of the women in my new mothers group are professionals in their mid- to late thirties, like me. Most of them were planning on returning to work but are struggling now, wanting to resume their careers but not sure how they can do it with a young child in their lives. They are looking for opportunities that will allow them to honour both priorities.

—Vice-President, industry association, Calgary

We did some employee surveys and focus groups and found out our employees weren't looking for the company to be involved in providing child care in the community, because people felt they could find their own day care. What they were really looking for was more support. They needed more flexibility in hours, for example, to access the existing day cares. We provided a wide range of flexible work options in response, in addition to contributing to the construction of a community day care centre.

—HR advisor, oil and gas company, Fort McMurray

Employee assistance programs

Employee Assistance Programs (EAPs) assist employees and family members with a range of personal concerns that may negatively affect employees' job performance, including substance abuse, mental health issues, family, financial, or marital problems, and legal or emotional stress. EAPs are typically pre-arranged by the employer and contracted to a local community organization or to an external company specializing in this type of service. Under many plans, employees and their family members can access counsellors through a toll-free line. After discussing the concern with the employee, the counsellor may refer the caller to appropriate community resources if specialized or long-term treatment is required.

The upside
- There is a broad range of support, services and packages to choose from.
- Both workers and their families may benefit.
- Employees are offered accessible, 24-hour, confidential support.
- A professional judgement can be made as to whether the employee is in need of long-term counselling assistance.

The downside
- Choosing providers and programs may be a daunting task.
- Costs may be prohibitive for small organizations.

Positive practices
- Carefully research and select EAP program providers, considering credentials, experience, expertise, location, scope of services, hours of service, fees, quality and process of referrals.
- Consult with industry associations for potential group plans (clusters of several companies creating some economies of scale).

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- Train and support supervisors in effective use of the program.
- Communicate the terms and benefits of the EAP to employees and family members.
- Promote the program with obvious endorsement of senior management.

> *We provide an employee assistance program and substance abuse professional services. Employees can access these confidentially and managers take training to help them deal with employees.*
> —*Human resources co-ordinator, geophysical contractor, Calgary*

Wellness programs

Wellness programs exist to assist with and educate employees about achieving and maintaining good physical, mental, emotional and social health. A broad range of information, services and programs fall under this title, including health-related education and training, health screenings, stress management, quit smoking programs, weight management, ergonomics assessment and workplace safety.

The upside
- Wellness programs are often viewed positively by employees.
- There is a broad range of options to consider.
- Employers report gains in employee retention, morale and productivity.
- Employers report reductions in health-care costs and accidents.

The downside
- Facility, location or size of the operation may limit affordability of options.
- Cost factors need to be considered.

Positive practices
- Make participation in wellness programs voluntary.
- Encourage employees to take a leadership role in areas of wellness expertise.
- Consider incentives (e.g. course fees reimbursed in part or in full).
- Allow for individual as well as corporate pursuits.
- Provide what you can (e.g. if you can't afford to put in a fitness facility, put in showers and lockers so people can bike to work).

> *We've just moved into a new office space and we designated space for an exercise room. It's available to all staff and they can bring in guests any time they want. I delegated the plan and assigned the set-up to two women in the office who were really excited about the idea. They just ran with it. I don't have to do a cost-benefit analysis on this one. It's not even open yet and I can already see the benefit in the smiles around the office.*
> —*General manager, new home builder, Edmonton*

57 winning ideas

This section presents a cross-section of ideas gleaned from interviews with Alberta employers and written accounts of Canadian companies. They are presented in no particular order. The ideas range from simple to complex, routine to wonderfully creative. Each one, taken alone, is a positive step that you can take to help you and your employees stay on the "upside" of work-life balance.

1. casual dress Fridays
2. lunchrooms, to encourage people to meet and eat together
3. more relaxing (home-like) furnishings in a gathering area
4. furnishings, decorations or points of interest (e.g. fish tank) that cause people to "take a breather"
5. employee bulletin boards for posting personal notes or requests (e.g. TV for sale, seeking carpool partners)
6. personal space rooms (e.g. retreat with a minor illness)
7. generously proportioned couches for naps
8. private phone rooms or booths to make personal calls
9. breakfast at company expense
10. no responses to e-mails required on weekends
11. no meetings between 8 and 9 a.m., leaving the first hour of the day free to catch up on work and with co-workers
12. no meetings every second Friday, allowing people to get more done and free up their weekends
13. scheduled breaks in the workday—middle, beginning or end of the day
14. social events or mixers to strengthen at-work friendships
15. family events to strengthen family/work connections, understanding and support
16. workplace tours, videos, photo diaries or "bring your child to work days" to help family members understand and support the employees' work commitment
17. grandparent's day off to spend with grandchildren
18. provide day care and after-school care at the work site
19. on-site fitness centres, opening fitness centres to family members
20. subsidies or passes to local fitness centres
21. bringing wellness into the workplace (e.g. massage therapists, yoga)
22. on-site convenience store
23. on-site rink, walking trails, basketball court, barbecue
24. on-site dry cleaning service
25. on-site cyber café
26. staff parking
27. taxi vouchers or bus fare for unplanned overtime
28. concierge services (e.g. shopping, pet walking, housecleaners or contractors)
29. automobile pickup and servicing
30. supper brought in for unplanned overtime

31. bulk discounts for ski passes
32. discounts on any company products
33. brokered discounts at popular retail outlets, restaurants, clubs or for car insurance
34. tuition reimbursements or subsidized living costs while employees are at school
35. scholarships for children of employees
36. low-interest loans
37. no-interest loans
38. paid memberships in community associations or local teams
39. limits to mandatory overtime
40. eliminate travel on Sunday to allow families to be together for a full weekend
41. eliminate mandatory Saturday night layovers for business trips
42. pay for employees to take a spouse along on a business trip
43. learning or wellness accounts
44. tickets to local theme parks, ballet, sporting events
45. company picnics, dinners, parties, golf tournaments
46. work/family account (a set amount to spend as they see fit)
47. pay for lessons not related to work
48. pay for meals or a housekeeper for a grieving family
49. a thank-you card to an employee
50. a thank-you card to the employee's family
51. well-behaved pets in the workplace
52. on the spot "good work" awards
53. work schedules that align with the bus schedule
54. policy that employees must take vacations
55. paid leave each month or each year to a volunteer
56. volunteering together as a work team
57. "dollars for doers"—charitable contributions earned by volunteer work

We've negotiated special discount programs as a benefit for our members' employees—discounts on life insurance, car insurance, mortgages, cell phones, long distance plans, car rentals, work wear…

—CEO, industry association

When we have to call unplanned overtime for a shift, we order in supper for everyone.

—Human resources manager, poultry plant, Calgary

We have a volunteer initiative program where employees go out as a team to volunteer. Each office location decides what they want to take on and arranges the details and we provide budget dollars. One of our offices has Dollars for Doers—for every 40 hours that an employee volunteers, the company will donate $200 to the registered charity of the employee's choice.

—Community investment advisor, energy company, Calgary

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Sometimes when a project team has had to put in really long hours, we have arranged concierge services—gave each team member an "allowance" to spend on getting their lawn cut, laundry done, child care, gardening—whatever they needed to help them through that time. The amount of support would depend on the intensity of the project.

—Manager, oil and gas company, Calgary

My boss will come up with a row of football tickets to a big game, gift certificates for dinner theatre…he puts some thought into it—all tangible expressions of his appreciation for doing a good job. I think it's really important that that type of thing be personal. You flip someone a $100 and it just goes to bills and it's forgotten. But this way, you create a memory which you link to the reason for the reward.

—Operations manager, roofing company, Edmonton

My father-in-law died this year after months of battling cancer. Work sent home a huge basket of food, goodies, little things. They couldn't really do anything for us but be understanding and supportive, but that was enough. Gestures like that earn the respect and trust of my whole family. My wife is more supportive of the commitment I make to my work because she knows they are committed to me as a person.

—Communications manager, international development agency, Calgary

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The Build-Your-Own Balance Plan

If you are a good employer, chances are you already do a lot to foster healthy work-life balance for your employees. Maybe you don't have formal programs or perfect policies, but you have a personal attitude and a work environment that is built on trust, mutual respect and support. This is an essential foundation for any work-life balance plan.

What will work for your workplace? The answer will be as unique as your employees and there is usually no single solution. In fact, you will probably need to consider a number of related changes. Whether your plans are modest or grand, the following five steps will help you shape a clear and positive process.

Step 1 Check it out: Needs assessment

Questions you need to ask

Your first step is to ask questions—a lot of them! At this point you need to have a very clear sense of:

- **the need for change**
  - ☐ Why do you think there is a problem with work-life balance?
  - ☐ What measures do you have to quantify this problem? (e.g. absentee rates, turnover data, comments at staff meetings)
  - ☐ What information do you have about potential cause(s)?
  - ☐ What is being done now or has been done in the past to address work-life balance?
  - ☐ How effective have these actions been?

- **your management style**
  - ☐ What do your actions or those of your supervisors say about work-life balance?
  - ☐ How do your supervisors feel about work-life balance options for employees?

- **your workers***
  - ☐ What are the demographics of your workforce? (e.g. gender, age range, number of employees with children, employees with special needs because of disabilities or religious obligations)

☐ What are the interests, needs and work-life issues of your employees?

☐ What do your employees think the company can or should do to support work-life balance?

These questions are crucial! Don't just assume that you know what is best for your workers. Studies show that if a work-life balance program is ineffective, it can often be tied back to insufficient communication or co-operation with staff.

- **the organization's business culture**
  ☐ What do your company policies say about work-life balance?
  ☐ How do people work and interact with each other, and what does that say about work-life balance?
  ☐ If the two answers above are different, why is that the case?

- **the business goals***
  ☐ What are the business goals of your company and the work unit?
  ☐ How will a work-life balance strategy help achieve the goals of the business plan?

A strategy that does not show a clear link to the goals and objectives of the organization is easily overlooked or shelved for other priorities.

- **the kind of work**
  ☐ What positions or work areas would benefit from work-life options?
  ☐ What are the job tasks and requirements of each position or work area?
  ☐ How will these influence the choice of work-life options?

- **the available range of options**
  ☐ What types and combinations of work-life practices can you consider?
  ☐ What supports would be required for each option?

Our people strategy is first of all a partnership between the company and employees. We start by understanding who our employees are—this may be through surveys or individual input, usually both. At the same time, we look at our business, what are the current needs, short- and long-term strategies. We also take into consideration what is available in the marketplace, i.e. what are our competitors doing? And we look for new ideas that we can use. This is not just a one-time effort. We keep looking and asking—we keep revisiting this to make sure that we are offering what is needed and appropriate.

—*Manager, oil and gas company, Calgary*

How to find the answers

If yours is a small operation and you work closely with your employees, answering these questions might be as simple as talking this over in the lunchroom. In a larger organization you may need to conduct surveys or focus groups to determine how needs vary by work unit or level in the organization and what impact each work-life option might have. Here are some things to keep in mind at this point.

- **Check around first.** Find out what your colleagues or your competitors are doing in this area. Look up the practices of organizations voted "Best Companies to Work For" or do an Internet search with the keywords "work-life balance." This information can help you to explain and build support as you start to address work-life issues.

- **Set and communicate clear objectives.** Explain the purpose of a needs assessment. For example: to define the business case for work-life balance; to identify the major work-life issues of employees; to determine how employees and managers can be more effective in their work and personal lives.

- **Ensure sufficient and balanced input.** Customers, suppliers, families or community members can provide you with helpful feedback on this important decision. If you can't hear from everyone, make sure you have talked to representatives of each major group.

- **Ask, don't tell.** Seek suggestions before providing yours. Ask open-ended and probing questions such as: "What would make a difference? What options would you like to see here? Can you give me an example?"

- **Keep an open mind and listen carefully.** Now is not the time to question, defend or promote any one idea or agenda. This is the time to listen, to brainstorm, to gather as many ideas and opinions as possible.

- **Document the responses.** What you hear can provide a benchmark for evaluating what you eventually do. Negative comments or concerns are especially instructive—you will want to address these in your plans and in your communications.

- **Consider using an external consultant.** Employees might be willing to speak more openly with an impartial outsider who will ensure confidentiality.

Here are just a few organizations offering excellent advice, samples, templates and tools for setting up work-life balance programs:

Human Resources Development Canada's Work-Life Balance in Canadian Workplaces
http://labour.hrdc-drhc.gc.ca/worklife/

National Quality Institute
www.nqi.ca

Employers for Work-Life Balance (United Kingdom)
www.employersforwork-lifebalance.org.uk

We use employee surveys to find out what the issues are for our employees. We report back to the board the results of these surveys and analyze what areas we need to be working on and we tie it back to training too. We communicate the results to employees and involve them in the change process. Subgroups are formed to work on particular issues.
—Director of HR, short-term care facility, Edmonton

We use employee surveys as well as exit interviews to get feedback from employees about the kind of changes they would like to see. Surveys are conducted anonymously and collected by an external consultant. We've made many changes in response to the survey process, for example: changes in our benefit plan.
—Manager of Human Resources, municipal office, Canmore

Sample employee survey

An annual employee satisfaction survey is a great way to benchmark and compare employee attitudes. These can be anonymous or completed as part of an annual performance review. If your company uses an employee survey, check to see if it contains questions related to work-life balance. If not, try modifying it to gain useful information or create your own survey using some of the sample questions that follow. If the survey will be anonymous, consider adding questions about demographic data, employment status or work division so you can assess how responses vary by segments of your employee population.

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Work-Life Balance Survey

	Strongly agree	Agree	Neutral	Disagree	Strongly disagree
Work-Life Balance					
1 I am able to balance work and life priorities well.					
2 I often bring work home.					
3 I often have to put in extra hours at work.					
4 Work pressures often interfere with my personal life.					
5 Personal pressures often interfere with my work life.					
6 In the past six months, work has caused me significant stress or worry.					
Managerial Support					
7 I have sufficient involvement in decisions that affect me.					
8 I can deal with urgent family or personal issues without hassles or reprisals.					
9 My supervisor has a sincere interest in the well-being of employees.					
10 My supervisor makes every effort to keep stress to a minimum.					
11 This company actively supports work-life balance for employees.					
Work-Life Balance Programs					
12 The .... program has made a difference in my work-life balance.					
13 I think the .... program is effectively and fairly administered.					
14 I would take advantage of .... if it were available here.					

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Step 2 Figure it out: Plan the Right Mix

You've learned what you need to know. The next step is to decide what work-life practices you will put in place. These decisions might fall to the owner, senior manager, the management team or, ideally, to a joint management/employee committee. If there are several issues under discussion, consider assigning tasks to separate "solution teams" to address different concerns. For example, you might set up a "travel time task force" to find ways to limit travel time for employees.

A custom fit

There is no one-size-fits-all solution. If your company is in manufacturing, for example, you may not be able to offer flexible hours, but you could offer a more flexible leave package. Start small and do what you can, making sure your practices fit your:

- employee needs
- work tasks
- business goals
- budget parameters
- support systems (e.g. technology, systems, facility)
- relevant legislation (e.g. occupational health and safety, employment standards).

A note of caution: sometimes a work-life balance program can suffer from an "employee backlash" if it is seen as a benefit for one group only. Try to create policies that are open to as wide a group of workers as possible. For example, rather than establishing a child care policy, broaden your plan to include any employee with a dependent, such as an aging relative. Let everyone know how this option will benefit the entire company, not just one subgroup of the workforce.

> *Periods of unemployment are a fact of life in this industry—we can't change that. So, we came up with a plan to help workers through those times so at least they wouldn't lose their benefits. Records are kept of a worker's hours and anything above what is required for that month's coverage goes into their personal hours bank account. Down the road the worker gets laid off for two months—those accumulated hours can be deducted to pay for benefits until they are back at work. It also works across companies…if the worker is laid off from one employer and starts elsewhere, the coverage continues.*
>
> *—CEO, employer association, construction industry, Edmonton*

A culture fit

A good program is never enough. Your work-life program will need to be set in a supportive culture where practice supports policy. (If, for example, the employee handbook says you can work part time but part-time employees never earn promotions, it isn't a credible option.) Your workplace needs to consistently

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reinforce the message that "work-life balance is important and valued here." If this is a new emphasis for your organization, change will take time. Steps to move the markers include:

- clearly demonstrating strong, obvious and consistent support from senior management
- training and coaching supervisors and managers
- sharing stories and supporting information from newspapers or magazines
- providing information briefings and communication pieces to promote the business case for your company
- defining accountability measures (e.g. write it into job descriptions)
- providing rewards and recognition for creative approaches to support work-life balance
- communicating and celebrating how work-life balance is a win-win for individuals and the company.

Policy guidelines

At this stage in development, it is best to put something down on paper, even if it is brief and informal. Written guidelines will:

- clarify acceptable practices
- signal that you are serious about this option
- help employees decide if this option is for them
- help managers implement the program
- help managers evaluate requests from employees
- ensure consistency in how the benefit is used and applied
- facilitate orientation for new employees
- facilitate promotion or communication of this option to third parties (e.g. job candidates).

There are numerous sample policy statements available on-line or in print. Consult the resources listed at the back of this publication for some examples, then determine your own procedures in consultation with your staff. It is important to consider these policies as "draft only" until you have had the chance to pilot them with employees, especially individuals who are new to the concept. You may wish to have a focus group, for example, where employees read through the policy and tell you how they interpret what they read.

Work-Life Policy Information Checklist

☐ **policy statement**—a concise description of the practice or program

☐ **policy objectives**—for both the organization and the employee

☐ **eligibility**—what positions or work units may apply

☐ **requirements**—minimum or maximum expectations

☐ **definitions**—of new or uncommon terms

☐ **administration**—who is in charge of this program and how it is monitored

☐ **enquiries**—contact person for more information or clarification

☐ **application**—how employees apply to participate

☐ **approval**—how applications are evaluated and by whom

☐ **feedback**—how employees can provide input on the policy

☐ **revision**—when and how this policy will be reviewed or revised

☐ **appeal process,** if applicable

☐ **date of publication or revision**

Finally, as you draft this policy, think about other policies or procedures that may need to be revised as a result, such as performance evaluation processes, employment contracts or employee orientation handbooks.

Sample policy: Flexible hours of work

Here is an example of a concise, clearly worded policy statement developed by the Treasury Board of Canada Secretariat, posted at www.tbs-sct.gc.ca (reprinted with permission).

FLEXIBLE HOURS OF WORK

Policy objective

To manage working time effectively by introducing mutually beneficial work schedules responsive to changing employer/employee needs and to help alleviate transportation problems in metropolitan areas.

Policy statement

Flexible hours may be implemented by management where such arrangements are consistent with operational needs and where performance and service to the public are maintained or improved.

Application

This policy applies to all departments and other portions of the Public Service listed in Part I of Schedule I of the *Public Staff Relations Act.*

Policy requirements

There must be a core period.

There must be a lunch period of at least 30 minutes and not more than 90 minutes.

Except as provided for in the variable workweek policy, banking of hours is not to be permitted.

References

- Collective agreements
- Terms and conditions of employment
  (TBM Compensation volume)
- Maximum hours of work (TBM Compensation volume)
- The variable workweek
  (TBM Human resources volume, chapter 2–3)
- This chapter replaces chapter 1–15 of PMM volume 8.

Enquiries

Enquiries relating to this policy should be referred to the responsible officer designated in departmental/organizational headquarters, who in turn may direct questions regarding interpretation to the Human Resources Branch of the Treasury Board of Canada Secretariat.

Appendix A – Definitions

Banking of hours—working more than the required number of hours in a day in order to work fewer than the required number of hours on some future day.

Core period—the period during which all non-shift employees must be on the job, beginning not later than 09:30 and ending not earlier than 15:30.

Flexible hours—a program whereby management authorizes an employee to vary his/her starting time (between 07:00 and 09:30), finishing time (between 15:30 and 18:00) and lunch period (between 30 and 90 minutes).

Check out these websites for on-line samples of policies:

Telecommuting Guidelines of the Government of Alberta
www.pao.gov.ab.ca/health/flexible-work/telecommuting

Human Resources Development Canada
http://labour.hrdc-drhc.gc.ca/worklife/sample-policies-en.cfm

Treasury Board of Canada Secretariat
http://www.tbs-sct.gc.ca/pubs_pol/hrpubs/tb_853/siglist_e.asp

Sample policy: Telecommuting guidelines (outline)

These guidelines, reproduced only in outline form here, are from *Home on the Job: Telecommuting in the Alberta Government.* Consult Resources and Sources at the back of this publication to order or download the full version.

TELECOMMUTING GUIDELINES OF THE GOVERNMENT OF ALBERTA

- Eligibility
- Criteria for approval
- Employee status and benefits
- Hours of work/overtime
- Office days
- On-site office
- Home office
- Equipment and furniture
- Costs and expenses

- Security/confidentiality
- Communications
- Work performance and measurement
- Telecommuting agreement

Step 3 Try it out: Implementation

Building on a solid needs analysis, a careful choice of options and some well-considered policies, you are now ready to put your plan into action. If possible, start small: test your program with a few individuals or work units to test your systems as well as your assumptions. Revise as needed before rolling out the program in full and remain committed to regularly reviewing the program.

Measuring return on investment

If and how you measure return on investment is a business decision. If yours is a small operation, the smiles on your employees' faces or the talk around the coffee machine may be the only evidence you need. If you want a more formal assessment, you will need two kinds of information: baseline data (the way things were before making the change) and the same measures taken after a reasonable length of time (long enough to make a difference).

The kind of data you may wish to collect to evaluate return on investment might include:

- rates of absenteeism, turnover, overtime or other indicators
- employee satisfaction measures
- productivity targets and results
- exit interview data

- employee participation statistics (who or how many participate in the program, distribution by key variables like position, gender, age group, work unit)
- program evaluations from
  - participants in the program
  - co-workers and supervisors of participants
  - administrators of the program
  - customers or clients
- program administration costs.

Step 4 Spell it out: Communication

Communication is key. Employees need to know what options are available to them, how each option works and how they can apply. It is important to communicate how the program will benefit the entire organization, even to individuals or work units that cannot participate. Otherwise, these individuals will see this program as a "perk" or "secret deal" for a select group and possibly something that will infringe upon their own rights and benefits.

Your communication can and should take many forms, such as:

- briefing sessions
- staff memos
- notices in the lunchroom
- company newsletters
- intranet notices or FAQ (Frequently Asked Questions)
- information brochures to family members
- interviews and news articles about success stories.

Remember that any communication needs to be two-way. How will employees let you know what they think about this policy? How will they ask questions or provide input for continuous improvement? Finally, keep talking. The need to communicate continues as long as you have this program in place.

Employee Proposals

How does an employee apply to participate in a work-life option? It might be as simple as talking to the owner or supervisor. However, there are certain advantages to putting something down on paper. A written proposal will:

- help employees organize their thoughts and clarify the specifics
- help employees think through the personal impact, both pros and cons
- document the request and resulting decision(s)
- hold managers accountable for their decisions
- help make the process more consistent
- serve as a basis of understanding or formal agreement.

We don't need anything too formal. We just have a standard memo that people fill out to let us know what kind of arrangement they are requesting or taking.

—*General manager, new home builder, Edmonton*

As a small hotel, we can't have everything written down in policies and procedures and that's a nice thing about being a smaller place. But you still want to put something in writing when you make any kind of an arrangement with an employee. It's important to have a paper trail.

—*General manager, hotel, Banff*

Employee Proposal Checklist

☐ employee personal data: name, position, work unit, direct supervisor

☐ date of submission

☐ statement of the requested change or program applied for

☐ details of the requested change (e.g. specific start/end times, number of hours per day)

☐ advantages or impact of the proposed change on the individual, co-workers, the organization

☐ potential problem areas and how these will be addressed

☐ required changes or supports to facilitate this change (e.g. technology upgrade, job redesign, facility renovation, impact on salary or benefits)

Step 5 Work it out: Lead by example

Whether or not employees can or even want to participate in a work-life option is often up to a direct supervisor or owner. Here actions speak louder than words— the supervisor who says work-life balance is important but works excessive hours and rewards only those who work long hours as well sends a very clear message about what is really valued in your organization. If participating in or even expressing an interest in a flexible work option brands an employee as less committed, not a team member, not management-material, then these programs are more risk than reward.

What steps can you take to earn the buy-in of these key players? Most of all, the owner and senior managers need to "walk the talk." Unless supervisors model it and culture confirms it, your employees will know that work-life options are just so much window-dressing: a great presentation, but anyone can see right through it.

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Manager buy-in: 10 paths to enlightenment

1. **Hire the right people.** Recruit managers who are committed to achieving business goals without overtaxing employees or work teams, and who have good listening skills.

2. **Provide the skills through training,** reference material, coaching or mentoring, to ensure managers know why and how to support work-life balance. Investing in these tangible supports will tell managers that your company is serious about work-life balance.

3. **Provide the tools** such as information brochures, proposal templates, criteria for evaluating employee proposals and checklists for implementing a program.

4. **Provide the systems** to support the program and measure its results, such as opportunities for staff to provide feedback, data collection and analysis services, and avenues for managers to ask questions and seek advice in overseeing flexible work arrangements.

5. **Give them authority** to make decisions that will support work-life balance for individuals or for the work unit. These might be on-the-spot decisions (allowing an employee to leave early) or the right to turn down a project that will strain the resources of the work unit.

6. **Give them latitude** to find a better or different way to improve work-life balance for employees and to be creative in how they interpret and apply the flexible working arrangements.

7. **Make them responsible** to "own" the decision by directly approving or communicating decisions to employees about work-life balance applications.

8. **Make them accountable** for setting targets (e.g. for participation in work-life balance programs, for results such as reduced absenteeism) and include the targets in position descriptions and performance agreements.

9. **Recognize and reward achievements.** For example, tie performance bonuses to supports for work-life balance or establish annual awards for work units that meet targets for both productivity and work-life balance.

10. **Celebrate successes.** Feature case studies, publish stories and communicate gains and benefits of work-life balance in company newsletters, on the intranet or at company-sponsored events.

- Roughly 44 per cent of Canadian organizations leave flexible work arrangements to the discretion of managers.
- Employees with supportive supervisors miss half as many workdays as those with supervisors who are not sensitive to their personal needs.
- One in three Canadian organizations provide managers with training in work-life balance.
- Less than 25 per cent of Canadian organizations offer recognition or rewards for promoting work-life balance.

—Conference Board of Canada, 1999

Resources and Sources

Resources

Alberta Human Resources and Employment

This government department has a website, call centres, a provincewide network of service centres and a variety of publications to help you make informed business and employment decisions. Publications can be downloaded or printed copies ordered on-line through the ALIS website at **www.alis.gov.ab.ca/careershop.** They are also available through the Alberta Career Information Hotline ((780) 422-4266 in Edmonton or 1-800-661-3753 toll-free elsewhere in Alberta) or can be picked up at any Alberta Human Resources and Employment service centre.

Deaf and hard of hearing callers with TDD units can call the Career Information Hotline at (780) 422-5283 in Edmonton or 1-800-232-7215 for message relay service.

The following materials are available free of charge to Alberta and NWT employers and employees:

- *Alberta Careers Update.* This book looks at the global and provincial trends affecting Alberta's economy and society. These trends have an impact on occupations in the province and can affect your business planning decisions.

- *Diversity: A strategy to meet your need for skilled workers.* How do you, as a business owner, fill shortages of skilled workers? Consider recruiting and training a diversified workforce. This book offers a sound business case and advice for hiring Aboriginal workers, immigrants, older workers, persons with disabilities, visible minorities and youth.

- *Employment Series for Persons with Disabilities: Tips for employers.* More and more employers are hiring persons with disabilities. This book provides employers with a practical business approach, answers to typical concerns and questions, and resources.

- *Finders & Keepers: Recruitment and retention strategies.* In an environment where employers in several business sectors are already facing a shortage of qualified employees, it is increasingly important for employers to thoughtfully approach the issues of employee recruitment and retention. This helpful publication offers guidance and information.

- *Rejuvenating Your Business.* This book explains why businesses need the mix of experienced and youthful staff to be viable in today's economy. It explains positive reasons for hiring youth and shows how to recruit, train, motivate and keep the best workers of the next generation.

Alberta Learning Information Service (ALIS) Website

ALIS is also Alberta's on-line source for career and learning information. This includes print and audiovisual career and workplace related resources. Visit **www.alis.gov.ab.ca/careershop** for more information or to view on-line. Copies can be picked up at any Alberta Human Resources and Employment service centre. Many of the publications are available free of charge to Alberta and NWT residents.

Call the **Workplace Health and Safety Contact Centre** for information about:

- the *Occupational Health and Safety Act*, regulation and code
- unsafe work practices and workplaces
- workplace hazards, including chemical contaminants, noise, asbestos, machinery, and fall protection
- publications and resources to assist your health and safety planning.

There is 24-hour access for reporting serious incidents and workplace fatalities.
Phone: 1-866-415-8690 toll-free in Alberta
Phone: (780) 415-8690 in Edmonton

Deaf and hard of hearing callers with TDD/TTY units call (780) 427-9999 in Edmonton or 1-800-232-7215 toll-free in other Alberta locations.

E-mail: whs@gov.ab.ca
Website: **www.worksafely.org**

Call the **Employment Standards Contact Centre** for information about the minimum rights and responsibilities of employers and employees relating to:

- employer records
- minimum wage
- hours of work and overtime
- general holidays and pay
- vacations and pay
- maternity and parental leave
- termination of employment
- adolescent and young person employment.

Recorded information and a faxback service for Employment Standards fact sheets is available 24 hours.

Phone: 310-0000 toll-free and enter (780) 427-3731 in Alberta
Phone: (780) 427-3731 in Edmonton

*Deaf and hard of hearing callers with TDD/TTY units call
(780) 427-9999 in Edmonton or 1-800-232-7215 toll-free in other
Alberta locations.*

E-mail: employmentstandards@gov.ab.ca
Website: **www.gov.ab.ca/hre/employmentstandards**

Other Provincial Government Resources

Contact **Service Alberta** for general inquiries on Alberta Government programs and services. Visit the Service Alberta website at **www.gov.ab.ca** or call 310-0000 toll-free anywhere in Alberta. Outside of Alberta call long distance at (780) 427-2711. Phone lines are open from 8 a.m. to 6 p.m. (Monday to Friday) and voicemail is available after hours.

*Deaf or hard of hearing callers with TTY equipment call (780) 427-9999
in Edmonton or 1-800-232-7215 toll-free in other Alberta locations.*

Better Balance Sources

Websites

- Alberta Human Rights and Citizenship Commission
  www.albertahumanrights.ab.ca

- Employment Standards Legislation in Canada
  **http://labour.hrdcdrhc.gc.ca/psait_spila/lmnec_eslc/
  index.cfm?fuseaction=english**

- Canadian Policy Research Networks
  www.cprn.com/en/

- Human Resources Development Canada
  http://labour.hrdc-drhc.gc.ca/worklife/work-life-balance-en.cfm

- Job Quality.ca
  www.jobquality.ca/

- National Quality Institute
  www.nqi.ca

- Personnel Administration Office, Alberta Government
  www.pao.gov.ab.ca/health/flexible-work/telecommuting/

- Vanier Institute for the Family
  www.vifamily.ca/

Publications

- *Home on the Job: Telecommuting in the Alberta Government,* Alberta Personnel Administration Office

- *The Job Share Handbook,* Alberta Personnel Administration Office

- *The Manager's Toolkit,* Vanier Institute of the Family

Selected research

- Aventis Pharma Inc. (2000) Angus Reid Survey on nationwide health care

- Canadian Business and Economic Roundtable on Mental Health (2000), *The Unheralded Business Crisis in Canada: Depression at Work*

- Canadian Federation of Independent Business and Scotiabank (1999), *Study on Workplace Satisfaction in Private, Public Sectors*

- Canadian Policy Research Networks (2001) *Work-Life Balance in the New Millennium: Where are We? Where Do We Need to Go?*

- Conference Board of Canada Study (1999) *Is work-life balance still an issue for Canadians and their employers? You bet it is.*

- DBM and the Globe and Mail (2003) "Future of Work" Survey Results

- Health Canada (1999) *An Examination of the Implications and Costs of Work-Life Conflict in Canada.*

- Health Canada (2002) *The 2001 National Work-Life Conflict Study*

- Health Canada (2002) Commission on the Future of Health Care in Canada, *Building on Values: The Future of Health Care in Canada*

- Human Resources Development Canada and the Centre for Families, Work and Well-Being at the University of Guelph (2001). *Work-Life Compendium 2001: 150 Canadian Statistics on Work, Family & Well-Being*

- Royal Bank Survey (2000) of university students by Ipsos-Reid

- Statistics Canada report (2003) *Part-time Work and Family Friendly Practices in Canadian Workplaces.*

- Women's Executive Network (2003) *Public Perceptions of Work-Life Balance,* survey conducted by Environics

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Notes

Feedback

We'd like to hear from you ...

Better Balance, Better Business: Date
Options for work-life issues

Did you find the information in this publication useful?
In what way?

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How could we improve it?

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Do you have any suggestions for other products that
would be of value to you?

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Would you like to receive a catalogue of our products?

Name ....

Organization ....

Address ....

.... Postal Code ....

Phone .... Fax ....

Please return this form to
People, Skills and Workplace Resources
Alberta Human Resources and Employment
12th Floor, 10030–107 Street, Edmonton, AB T5J 3E4
Fax: 780-422-5319