Work-Life Balance:
Achievable Goal or Pipe Dream?

Nora Spinks

Balance: employees want it, managers need it, organizations can’t afford to ignore it!

Organizational success depends on people. People have multiple responsibilities, diverse needs, and often, conflicting priorities. Leading organizations need to attract and retain the best people. People need work experiences where they can reach their full potential, be fully engaged, and be able to meet their personal and professional goals and objectives. Exceptional organizations have leaders that create work environments where people can achieve work-life balance and well-being as they define it for themselves.

A hundred years ago, a group of women described how finding meaningful work for a meaningful wage was one of their biggest challenges. They went on to say that if you were one of the lucky few to find meaningful work for a meaningful wage the only way you could take advantage of the opportunity was to “filch” time from family, friends, and the community.

Many employees today would agree that, when it comes to work-life balance, things haven’t changed much in the past century. So why is it so hard and what can we do in our lives, workplaces, homes, and communities to make it possible to achieve a sense of balance, satisfaction, happiness, and success without guilt, sacrifice, and compromise.

First, it is important to understand that no one can achieve balance without support from the employer, co-workers, family, or community.

Employers have spent the past two decades wrestling with the problem. Many leading organizations have begun offering flexible work arrangements such as flextime, job sharing, and telecommuting; generous maternity/parental leaves; alternative career paths; and

If your organization is considering how to implement an effective work-life balance program or wants to improve its current efforts, the process and tools in this article will be invaluable.
workplace supports like convenience services, on-site childcare, and fitness programs; mental health and information and referral services; and more recently, massage, car care, and laundry services on site.

Despite the innovation and intent of these initiatives, most organizations report low utilization, difficulty getting middle management buy-in, and ongoing challenges with communicating the offerings. Long-hours culture is common. Employees are convinced that you have to choose work or life, and balance is not an option. Managers are frustrated because their employees are struggling as they try to fulfill their multiple responsibilities; employees often are distracted, exhausted, or absent.

Co-worker support, flexibility, and adaptability are crucial when employees are trying to find balance. Comprehensive planning, clear priorities, adequate resources, and clear communication make it possible for a team or work unit to be responsive, focused, efficient, and resilient. These co-workers and the managers that provide the leadership create the work environment that is an important element in the work-life balance equation.

Immediate family, friends, and neighbours provide stability and backup when an employee is dealing with the everyday demands of raising a family, caring for a sick or dying family member, starting or maintaining a personal relationship, taking courses, engaging in physical activity, or contributing to the community. They are also important in times of crisis, whether it is an inconvenience like a car breaking down or a major life event like a death in the family. Family and friends provide the emotional and social support to cope with life and minimize work-life conflict.

Access to community resources—such as childcare; after-school programs; summer camps; recreation and leisure opportunities; eldercare, healthcare, and home care that are reliable, affordable, and high quality—helps employees meet their obligations, achieve their personal and professional objectives, and effectively manage the unpredictable and unexpected realities of life.

In the absence of any one of these support mechanisms, the others have to pick up the slack. When community-based childcare is nonexistent or unavailable, employers introduce workplace child development centres. When eldercare is not available, employers offer compassionate leave. When employers are inflexible or unsupportive, employees must rely more heavily on family and friends for help.

Imagine trying to balance on a three-legged stool—one leg representing workplace supports (programs, policies, supportive managers and co-workers, reasonable workloads, and hours of work, etc.), one leg representing the home (family, friends, and neighbors), and the last leg representing the community (programs, services, and resources). When all three legs are strong and reliable, balance is more easily achieved. If any one leg is weak, missing, or wobbly, the ability to achieve balance becomes more stressful and harder, if not impossible, to achieve.

Constructing Your Work-Life Strategy

The costs of imbalance are well documented. Researchers around the world have documented the costs to individual health, organizational stability, and community well-being; however, many organizations are having trouble getting started or maintaining momentum.

It’s important to remember that no one person needs to take on the whole responsibility for employees’ balance. The success of any work-life initiative starts with each player on the team playing his/her part. Executives and leaders need to articulate a vision for a healthy and resilient work force, a productive and successful organization, and satisfied customers/clients. Managers need to model healthy habits and balance behaviours, such as good self-management (time, stress, and career management, healthy lifestyle choices,
conflict resolution, and problem solving). Employees need to take responsibility for their own choices (diet, exercise, sleep, stress reactions, relationships, career development, and personal and professional development).

Regardless of how long an organization, an HR department, or team leader has worked to address work-life issues, it is critical to complete a regular planning cycle. The typical work-life planning cycle starts like all other effective planning processes—taking stock, taking action, and taking measurements.

The following five-step process can be used to assess the current situation and develop an appropriate strategy:

1. **Assess your current position; review existing programs, policies, and pilots; and if appropriate, benchmark against other organizations.** A good indicator of where to focus your energies is finding the discrepancy between what HR thinks it is offering and what employees across the organization think is available. For example, formally or informally, ask employees about the organization’s telework program (whether you have one or not). Their answers may surprise you. It will help you determine what is on paper versus what is acceptable in the culture. It will tell you where you may need to revitalize, re-launch, or remove certain policies or programs.

2. **Consult with stakeholders, determine levels of satisfaction, examine factors contributing to utilization rates, and review individual and organizational impact of the initiatives.** Use focus groups, exit interviews, employee surveys, key informant interviews, manager forums, employee meetings, employee engagement initiatives, training reports, performance management data (360° feedback results and employee performance documents), attendance management data (sick leaves, voluntary turnover, maternity leave returns, short-term, and long-term disability data), occupational health and wellness committee reports, employee assistance program usage reports, employer-of-choice lists, recent retiree dialogues, stories, and experiences.

3. **Consider your options; talk to your suppliers; look at what is available in your community, online, or in the marketplace.** The work-life field is rapidly changing. In the late 1990s new convenient services or concierge programs were popping up every month. Today it’s massage services, lunch time Pilates, and yoga in the wellness centre; low-carb menus in food services; and coaching services for overworked executives. Be cautious of suppliers who are selling everything for everyone in every situation. Be aware of the new kid on the block; work-life looks easier than it is. Be leery of any “one-size-fits-all” solutions.

   Be prepared to make an investment; however, work-life solutions are not always expensive. In fact, at the top of their wish list, employees want management’s acknowledgment of the work-life challenges they face and respect for the choices they make. Second, they want flexibility and control over how, where, and when the work gets done. Neither of the top two solutions cost much capital or financial investment, but they do take considerable intellectual, emotional, and time investment from HR, managers, and business leaders. Don’t skimp; the return on investment is high.

4. **Articulate your plan, set your goals, document your objectives, and complete an action plan.** Don’t try to do it all at once. Your organization probably took decades to develop the behaviours and attitudes that are contributing to employee imbalance; employees have likely developed their unhealthy habits over years. Don’t expect to undo the damage overnight. Be strategic. Target “low-hanging fruit”; look for fast fixes to little irritants first. If you don’t remove the pebble in the shoe first, any journey is going to feel long and hard. Build on your quick wins to build momentum before you tackle the big issues like changing organizational culture. Be realistic. Achieving work-life balance is hard, not impossible, but it requires effort, collaboration, and cooperation.

5. **Execute the plan, establish monitoring and reporting procedures and routines, ensure accountability, provide adequate resources, and communicate continually.** Measure everything so you know what you can celebrate, modify, or stop doing some things.

**The Basic Architecture**

Start with a foundation and a framework as shown in Table 1. Your foundation is the organization’s vision, mission, values, strengths, and existing resources mixed with your employees’ skills, talents, and interests.

For your framework, use the work-life continuum. The continuum helps you focus on what is working or is not working, what you need or do not need, and...
### Figure 1: Organization Work-Life Continuum

<table>
<thead>
<tr>
<th>Developmental Stage and Indicative Behaviours</th>
<th>Organizational Awareness, Perception, and Action</th>
<th>Organizational Realities, Response, and Research</th>
<th>Employee Results and Organizational Impact</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ignore or Deny Issues</td>
<td><strong>Awareness:</strong> No awareness of issues, business case, or implications of work-life conflicts. <strong>Perception:</strong> Work-life is a personal not a business issue. <strong>Action:</strong> None—inaction in the workplace because “work is not the place for personal issues.”</td>
<td><strong>Reality:</strong> Focus is on work (harder, faster); philosophy is do more with less, priority is to keep personal issues personal. <strong>Response:</strong> None. <strong>Research:</strong> None.</td>
<td>Work-family-life conflict. High stress, high turnover, absenteeism and low morale, low job satisfaction.</td>
</tr>
<tr>
<td>Make Accommodations</td>
<td><strong>Awareness:</strong> Some awareness of work-life issues; limited understanding of the business case. <strong>Perception:</strong> Work-life and personal issues interfere with work, productivity, etc. <strong>Positioning:</strong> Work-life is seen initially as a “Women’s Issue,” therefore work-life initiatives are tied to diversity strategy; then work-life is seen increasingly as an “HR Issue.” <strong>Action:</strong> Programmatic or tactical approach: Policies and/or programs are piloted, have limited accessibility, and low uptake.</td>
<td><strong>Reality:</strong> Focus on work-life as a women’s and diversity issue. <strong>Response:</strong> Initially, the focus is on childcare (resource and referral), maternity leave, and short-term, flexible work arrangements, then broadens to familycare (childcare, eldercare, stress management, etc.). <strong>Research:</strong> Initially some informal investigation is conducted to determine “burning issues.” More formal research and needs assessments begin.</td>
<td>Work-family-life interference, role overload. Stress levels for participants drop to moderate levels, co-worker backlash present, absence rates are reduced.</td>
</tr>
<tr>
<td>Provide Supports</td>
<td><strong>Awareness:</strong> Awareness of work-life and well-being increases, tentative understanding of the business case. <strong>Perception:</strong> Work-life issues affect all employees, and are complex but manageable with the right supports. <strong>Positioning:</strong> Work-life is seen as a “Competitive Issue” and as a “Business Issue.” <strong>Actions:</strong> Develop and implement organization-wide strategy.</td>
<td><strong>Reality:</strong> Focus on business case. <strong>Response:</strong> Focus broadens to a holistic Life Cycle view, including career planning and personal development. There is accountability and authority assigned to an executive and/or a department. May involve the establishment of a task force or committee. <strong>Research:</strong> Formal data collection, research, and analysis begins and regular benchmarking is conducted. Issues are integrated into assessments and opinion surveys.</td>
<td>Work-life balance. Employee commitment and high job satisfaction.</td>
</tr>
<tr>
<td>Make Commitments</td>
<td><strong>Awareness:</strong> Broad understanding of issues and business case. <strong>Perception:</strong> To effectively address work-life issues organizations must engage in a cultural change process. <strong>Positioning:</strong> Work-life issues are seen as a Business Imperative and an Economic Issue. <strong>Action:</strong> Organization participates in collaborations and partnerships with other organizations and the community.</td>
<td><strong>Reality:</strong> Focus is on short- and long-term returns to a work force in harmony. <strong>Response:</strong> Initiatives aimed at both individuals and organizational change. The concepts are integrated into all planning and organizational development processes. <strong>Research:</strong> Organizations embark on influential research and formal reviews of the programs, process, and the outcomes of the individual initiatives and overall strategy.</td>
<td>Work-life integration, effectiveness. Employee engagement and high life satisfaction.</td>
</tr>
<tr>
<td>Leverage Knowledge Experience Resources</td>
<td><strong>Awareness:</strong> Broad understanding of issues and impact. <strong>Perception:</strong> Issues affect organizational performance and profitability, as well as community economic and social performance. <strong>Positioning:</strong> Work-life is seen as a broad Social and Economic Issue. <strong>Action:</strong> Work-life and well-being are integrated into all organizational actions, plans, and processes.</td>
<td><strong>Reality:</strong> Focus is on long-term organizational and community resiliency and sustainability with a linkage to corporate citizenship. <strong>Response:</strong> The concepts are embedded in organizational culture. <strong>Research:</strong> Organizations engage in applied collaborative research to understand internal and external implications.</td>
<td>Work-life harmony, satisfaction, contentment. Individual and organizational resiliency.</td>
</tr>
</tbody>
</table>
what is effective or is not effective. It helps you create a vision of the future using a work-life lens.

The continuum consists of five developmental stages: InActive, ReActive, Active, ProActive, and InterActive. Like any continuum, organizations and departments may slide backward from time to time, usually as a result of losing momentum, losing focus, or losing sight of the vision. Backsliding may also occur because of uncontrollable circumstances, such as a merger, downsizing, restructuring, economic downturn, change in leadership, or rapid growth. Don’t be discouraged when a slippage occurs; it is part of the change process; however, don’t use it as an excuse to stop your efforts. The business case for balance remains strong; don’t give up just because it is hard work. Your rewards will be worth the effort.

Before reviewing the stages along the work-life developmental continuum, it is important to understand that this model is for assessing organizations or work units, not individuals. It is hard to get everyone within an organization moving along the continuum at the same pace or with the same passion and enthusiasm. Don’t despair! Once the majority moves forward, the laggards will either run to catch up or leave. They may make a lot of noise, expressing how they feel about work-life issues, but that noise usually doesn’t last very long. Often the late adopters become the loudest advocates when the positive results become evident. Focus on your supportive managers and passionate supporters. Stay aware of the critics and dissenters, but don’t let them hijack your agenda.

The amount of time it takes an organization to complete a stage varies. Determining factors include leadership, commitment, strength of the plan, and engagement of managers and employees.

The five stages indicate the range, scope, and depth of involvement with work-life and well-being including:

- The approach taken (programmatic to strategic).
- The perception or thinking about the issues (work-life and well-being as a personal or women’s issue to a social and economic issue).
- The level of commitment made in creating supportive and effective work environments and fulfilling work-life and well-being responsibilities (simply providing employment or active involvement in fulfilling social responsibilities and practicing good corporate/organizational citizenship).
- The metrics and measurements used to develop the business case for action (informal observations to formal investigation and collaborative research on the issues, interventions, and impacts of work-life balance and well-being from an organizational and societal perspective).
- The resources allocated based on achieving certain objectives and/or realizing certain results or outcomes from a personal and organizational perspective (manage certain stressors or factors contributing to imbalance or ill health, such as hours of work, workload, and stress to minimize work-life interference and/or role overload or to facilitate employees to achieve work-life harmony).

**InActive Stage**

InActive organizations have no formal policies or practices, informal supports, or understanding of the business case for balance. There is no leadership, and no metrics are in place to measure the costs and consequences for individuals, departments, or organizations.

Employees in InActive organizations experience high levels of stress, work-family interference, and role overload. They try to address their personal and family needs alone. They are often forced to leave their jobs or turn down opportunities for advancement. Employees have great difficulty in reaching their full potential. They are often exhausted and exhibit symptoms of burnout.

**ReActive Stage**

ReActive organizations have the human resources department working on the development of supportive policies (e.g., flexible work arrangements, job-sharing, or telework). They take a tactical approach by offering some programs, policies, or pilots (employee assistance program, childcare referral service, fitness facility, or subsidized cafeteria). They have begun to identify work-life issues as a priority. They tend to focus on accommodating employee needs, such as family needs (childcare and eldercare). Work-life and well-being issues are included in employee surveys, or they have conducted formal research into the issues (participated in an external study, held focus groups, etc.).

Employees who take advantage of the programs are able to reduce their stress levels. Some return on investment is achieved. Resistance and reluctance continues from employees and managers.
Active Stage

Active organizations begin to recognize how work-family issues affect the ability of the organization to reach its business objectives. They begin to address the issues from an organizational or strategic perspective.

Policies are well communicated, programs are entrenched, managers are less reluctant, there is some community involvement (local committees or work-life networks), and targeted initiatives begin the transition to work-life strategies.

Senior executives recognize work-life issues as business issues and fully understand the competitive advantage they have over nonsupportive organizations. They often have a work-life task force or a person or department with responsibility for the work-life strategy. Work-life and well-being research is ongoing and formalized.

Individual practices, policies, and programs are integrated and become more intertwined. A job-share team may work a compressed workweek and participate in stress reduction workshops at lunch, as well as represent flexible work arrangements on the work-life task force.

ProActive Stage

In the ProActive stage, managers become more supportive and organizations begin to notice the culture change. Strategically positioned and leveraged work-life programs are recognized as an important economic issue. In ProActive organizations, employee commitment is high; organizational resilience is strong; and leadership is empowering. Work and family responsibilities are seen as both important and essential for continued organizational and economic growth.

InterActive Stage

In the final, InterActive, developmental stage, organizations provide leadership in the community and/or within their industries. They establish collaborations and partnerships with their employees, unions, other organizations, professional associations, and community groups.

They experience heightened levels of creativity and receive external recognition. They integrate their work-life initiatives with their corporate citizenship and philanthropy, and they celebrate families, individuals, and diversity.

Employees experience little work-family stress or interference, express high levels of work and personal life satisfaction, have the lowest rates of absenteeism, and highest customer retention and customer satisfaction ratings. The work force is highly productive at work and in the community. These organizations and their senior executives, directors, and principles receive public recognition for the organizations’ achievements and for their leadership.

Research shows that organizations that successfully reach this stage along the work-life continuum can directly and indirectly identify how their work-life initiative impacts profits and shareholder value.

The Tool Box

Use the work-life continuum as a tool for developing, implementing, and monitoring your organization’s plans. Remember that teams, departments, and business units may be in different places at different times. Some leaders, managers, and directors may be farther ahead or behind the rest of the organization. The value of the tool is the ability to identify what elements you have in each stage and to leverage those who are ahead to pull the rest along.

For example, if you are firmly and consistently at the second phase of the ReActive stage, you may want to target having 85% of your organization at the Active stage by the end of the next fiscal year. To achieve that goal you will need to position your initiatives as a competitive imperative for organizational success and as a strategic business issue, so you will link your work-life initiatives to your recruitment and retention strategies, your business development goals, and your organizational development initiatives.

You may expand your programs to include the full life cycle and include all personal responsibilities, such as education and career development and caring for aging relatives or ill, injured, or disabled family members. You may enhance your policies (e.g., extend leave options beyond maternity leave to include family leave, education leave, and/or personal leave). You may establish a multidisciplinary task force to monitor and expand existing programs and policies and to evaluate progress.

You may join external councils, committees, or consortiums to benchmark your progress and learn from other organizations’ experience. In addition, you may develop metrics and measurements to hold individuals and managers accountable for creating...
supportive work environments, such as including work-life balance and wellness in measurement tools (e.g., balanced scorecard, 360° feedback, performance evaluations, team assessments, bonus and reward strategies, etc.).

The Construction Checklist

The checklist shown in the sidebar can be used to rate your organization on four critical work-life program components: awareness (value), perception (commitment), positioning (strategy and solutions), and action (leadership and accountability). The indicators for each component are rated using a one-to-five scale, where one means strong disagreement and five means strong agreement. The lower the score, the less progress you have made along the continuum.

The Final Product

Balance is an achievable goal. It is easier to accomplish with supports in the workplace, at home, and in the community. Work-life balance and well-being must be self-defined. Employers that understand the issues, take a strategic approach, and maintain their focus will produce a strong, committed, and engaged workforce; effective, competitive, and resilient organizations; healthy communities; and a strong economy. Success requires leadership, solid infrastructures, accountability, excellent communication, and strong relationships with employees and the community.

A hundred years from now, we will read about how extraordinary organizations created work environments so that employees no longer had to “filch” time from family, friends, and community in order to have a satisfying job and a successful career.

Nora Spinks is president of Work-Life Harmony Enterprises, an international consulting and research firm, based in Toronto. She can be reached via e-mail at nspinks@worklifeharmony.ca or by telephone at 800-965-2414.