



MONASH University
Business and Economics

**ACREW:
Work/Life Research Program
KEY Performance Indicators Project**

ACREW Researchers:

Associate Professor Anne Bardoel

Professor Helen De Cieri

Dr Susan Mayson

with

Marie Crozier-Durham

Work Life Resources

Siusan MacKenzie

Equilibrium Worklife Solutions



The Australian Centre for Research in Employment and Work (ACREW)

The Australian Centre for Research in Employment and Work (ACREW) has been established to promote research and scholarship in the broad area of work and employment. A key aim for the Centre is the promotion of collaborative research from a diverse range of areas, including human resource management, industrial and employee relations and organisational behaviour. ACREW seeks to encourage projects spanning private, not-for-profit and government sectors. The Centre also seeks to encourage projects with multiple outcomes including publications, activities that build towards nationally competitive grant applications and recommendations that have both practical relevance to industry and have social value.

The Work/Life Research Program is one of the flagship research projects currently being supported by ACREW. ACREW's Work/Life Research Program provides a coordinated research program in the area of work/life that raises awareness of work-life balance issues among policy-makers, researchers and practitioners in Australia and the Asia Pacific area.

<http://www.buseco.monash.edu.au/mgt/research/acrew/>

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Enquiries can be addressed to Associate Professor Anne Bardoel,
Email: anne.bardoel@buseco.monash.edu.au

Table of Contents:

| | |
|---|-----------|
| A. Introduction | 4 |
| B. Selected Work/Life Performance Indicators, Standards and Indices by Country | 5 |
| AUSTRALIA..... | 5 |
| 1. ACCI /BCA Work and Family Awards Criteria | 5 |
| 2. Managing Work Life Balance: The Way Ahead Annual Survey | 6 |
| BELGIUM..... | 6 |
| 3. Family and Business Audit | 6 |
| CANADA..... | 7 |
| 4. Canadian Government Checklist for Employers..... | 7 |
| 5. Job Quality Canada Work/Life Balance Indicators..... | 7 |
| GERMANY | 8 |
| 6. Familie und Beruf (Families and Organisation)..... | 8 |
| IRELAND..... | 8 |
| 7. Work Life Balance Network – Work Life Balance Framework | 8 |
| NEW ZEALAND | 9 |
| 8. EEO Trust Work & Family Awards..... | 9 |
| SINGAPORE | 9 |
| 9. Work/Life Excellence Awards..... | 9 |
| SPAIN..... | 10 |
| 10. IESE Family Responsible Company Index (IFREI)..... | 10 |
| UNITED KINGDOM | 11 |
| 11. Clutterbuck and Associates. The Quality Model for Work-Life Balance | 11 |
| 12. DTI - Work /Life Balance Challenge Fund Tavistock Institute | 11 |
| 13. Employers for Work Life Balance Benchmarking Tool | 12 |
| 14. Investors in People Work/Life Balance Model | 12 |
| 15. Work Life Research Centre – Work Life Framework Six Steps to Success | 12 |
| 16. Work Life Balance Consultancy. The Work-Life Balance Standard | 13 |
| UNITED STATES | 13 |
| 17. Alliance for Work/Life Progress – Work/Life Effectiveness | 13 |
| 18. Boston College Center for Work and Family – The Excellence Index | 13 |
| 19. Families and Work Institute – Family Friendly Company Index..... | 14 |

A. Introduction

ACREW's Work/Life Research Program provides a coordinated research program in the area of work/life that raises awareness of work/life balance issues among policy-makers, researchers and practitioners in Australia and the Asia Pacific area. The program's current focus is on developing key performance indicators (KPIs) for Australia to measure the extent of adoption of work/life strategies and their outcomes, costs and benefits.

With regard to work/life practice, there are a range of instruments used in a variety of countries to identify good performance, assist performance improvement, and/or inform the achievement of certification or the winning of awards for best practice. These instruments can be standards, indices, audits, frameworks, benchmarking tools, and award criteria.

As such, they not only provide information on the company's performance, but assist in strategic decision-making. In addition, performance indicators can serve as benchmarks, making it possible to compare different companies. If associated with awards, they can also be used as marketing instruments to gain competitive advantage.

This report provides several examples of work/life performance indicators, awards and indices used throughout the world. It includes information from Australia, Belgium, Canada, Germany, Ireland, New Zealand, Singapore, Spain, the United Kingdom and the United States. Some performance indicators are implemented by governments or government-funded organisations, while others are developed by professional associations, consultants or academics.

The summary below hopes to assist Human Resources (HR) practitioners and specialists by reviewing a variety of existing approaches to performance indicators in work/life practice today. The next step for ACREW and the Work/Life Research Program is under way and consists in developing a framework of Key Performance Indicators (KPIs) of work/life practice for Australian companies. Suggestions during this process are extremely welcome and should be directed to:

Associate Professor Anne Bardoel
Department of Management
Faculty of Business & Economics
Monash University
(03) 9903-2675
anne.bardoel@buseco.monash.edu.au

B. Selected Work/Life Performance Indicators, Standards and Indices by Country

AUSTRALIA

1. ACCI/BCA Work and Family Awards Criteria

Website: www.workplace.gov.au/workplace/Organisation/Employer/WorkFamily

The award criteria include assessment of policies and benefits and other criteria related to inclusiveness, communication, integration, impact and evaluation. Examples of policies and benefits include:

- Working hours and leave arrangements
- Child and elder care initiatives
- Initiatives for older workers
- Other initiatives

Specific criteria for the award include the following questions:

- a) How was the need for work/life policies identified in your organisation? What were the key work/life issues identified and addressed? Are the initiatives available to all staff?
- b) What implementation strategies and processes (including efforts to ensure managers and supervisors at all levels give due respect to employees' work/life needs) have you used to ensure awareness of your policies? What awards apply?
- c) What mechanisms have you used to integrate your work/life policies into your organisation?
- d) What have been the positive outcomes to the organization? Do you have data/statistics to support the success of the initiatives? What are the positive outcomes for employees due to the implementation of work/life initiatives? Do you have any data on the employee usage rate of your work/life initiative? How were they collected? And what do they show?
- e) Are outcomes identified/measured through the evaluation strategy? Is there a demonstrated commitment to continuous improvement through review mechanisms/evaluation strategies?

2. Managing Work Life Balance: The Way Ahead Annual Survey

Website: www.worklifebalance.com.au/research.html

This tool surveys such work/life aspects as (new items are introduced from time to time):

- Progress of work/life balance initiative
- Motivation to implement
- Means of identifying needs
- Aim of work/life strategy
- Priorities of work/life strategies in the past 12 months
- Success of work/life culture strategy
- Success in modifying features in the culture
- Means of achieving culture change
- Plans to continue efforts
- Evaluation of work/life strategies
- Categories of data the evaluation process produced
- Health and well-being option
- Priorities for health and well-being
- Leadership
- Best practice
- Factors hindering impact
- Action over past 12 months
- Steps which have supported major achievements
- Flexible work options
- Ageing
- Demographic profile

BELGIUM

3. Family and Business Audit

Website: www.bcfwp.org/Conference_papers/CombinationModel2003.doc

The main objective of the Family and Business Audit (FBA), a Belgian government initiative is to provide an audit instrument for guiding the development of work/family policies and processes in organisations. It comprises four categories:

- Work time scheduling
- Leave arrangements
- Work organization, quality of work and organizational culture
- Resourcing

It is not a self-assessment process, rather one which is administered by qualified personnel. It combines quantitative and qualitative approaches.

CANADA

4. Canadian Government Checklist for Employers

This simple checklist is organised around the categories of:

- Attitudes and Culture
- Programs
- Communication

5. Job Quality Canada Work/Life Balance Indicators

Website: www.jobquality.ca

The model draws on research into regional differences in Canada (Duxbury, 2003). The stated purpose of the framework of indicators is to assist governments and employers develop policies and practices to support enhanced work/life balance.

The framework comprises the following categories and indicators:

- **The Work Environment**
 - Perceived flexibility
 - Management support
 - Organisational culture
- **Work/Life Conflict**
 - Role overload
 - Role interference
 - Care-giver strain
- **Family Outcomes**
 - Decisions to have children
- **Organisational Outcomes**
 - View of one's employer
 - Commitment
 - Job stress
 - Job satisfaction
 - Intention to turnover
 - Absenteeism

- **Employee Well-Being**

- Perceived physical strain
- Perceived stress
- Depressed mood
- Life satisfaction
- Burnout

GERMANY

6. Familie und Beruf (Families and Organisation)

Website: www.peer-review-social-inclusion.net/peer/pdf_pool/04_DE_disc_en_041201.pdf

This is a management tool used to assess current action in relation to work and family and guide planning. It identifies nine action fields and individual items within the fields are evaluated on a point system. The action fields are:

- Working time
- Workflow and job content
- Workplace
- Information and communication policies
- Leadership qualities
- Development of human resources
- Remuneration and benefits
- Supportive services for families
- Specific corporate features

IRELAND

7. Work Life Balance Network – Work Life Balance Framework

Website: www.wlbn.net

This framework sets out a work/life balance development continuum of change and the characteristics of the different stages. The work/life balance criteria are:

- Work/life balance policies
- Culture to support work/life balance
- Assessment and monitoring
- Communications

- Business case
- Management
- Work practices
- Developing people competencies within the organisation

The stages of change across the continuum are Formative, Broadening, Deepening and Mature work/life balance organisation.

A diagnostic checklist is accompanied by a self- scoring process sections which assists an organisation recognize what stage of each continuum it is at and the most appropriate action to take to promote development.

NEW ZEALAND

8. EEO Trust Work & Family Awards

Website: www.eeotrust.org.nz

The information asked for in relation to this award includes:

- Rationale for work/life initiative
- Range of initiatives.
- Inclusiveness
- Evidence of senior management commitment
- Needs analysis methods
- Benefit to employees
- Benefits to the organization
- Lessons learned

SINGAPORE

9. Work/Life Excellence Awards

Website: www.wleaward.com.sg

Completion of an on-line pre -application self-assessment is promoted. Each question calls for evidence and indicated a level of strategy progress on a scale of 1 to 5.

The Singapore Work/Life Excellence Awards application form contains the following questions:

- How important is work/life to your strategy in your organisation?
- How do your organisation's leaders demonstrate commitment to the work/life strategy?

- How does your organization identify and respond to your employees' needs?
- To what extent has your organisation implemented work/life strategy programs
- How does the organization raise awareness of work/life issues and offerings?
- How effective is your work/life strategy?
- How committed is your organisation to improvements and innovation in the work/life strategy?

SPAIN

10. IESE Family Responsible Company Index (IFREI)

Website: www.iese.edu/en/files/6_15101.pdf

This Spanish Index and Family Responsible Certificate provides guidelines for transformation into a family responsible company within a model of ongoing development. The dynamic model constitutes a guideline to know the stage of development of the company and comprises focus on Policies, Facilitators, Culture and Results with the following indicators:

- **Policies**

- Work Flexibility
- Professional Support
- Family Services
- Extra benefits

- **Facilitators**

- Leadership
- Communication
- Responsibility
- Strategy

- **Culture**

- Impediments
- Energisers

- **Results**

UNITED KINGDOM

11. Clutterbuck and Associates. The Quality Model for Work-Life Balance

Website: www.coachingnetwork.org.uk/ResourceCentre/Articles/ViewArticle.asp?artId=83

The Model comprises:

| | | | |
|-----------------------------|-------------------|------------------------------------|---------------------------|
| POLICIES | PROCESSES | PEOPLE | OUTCOMES |
| Time Flexibility | Work organisation | Role Models | For individuals |
| Location Flexibility | Technology | Inform/Educate/ Consult/Empower | For the organisation |
| Benefits and Support | HR Systems | Training | For society/the community |
| Measurement BENCHMARKING | AUDIT | FEEDBACK | REVIEW |
| Implementation PLANS | RESOURCES | BEHAVIOUR | SUSTAINABILITY |

12. DTI - Work /Life Balance Challenge Fund Tavistock Institute

The key themes of the work/life audit include:

- The reasons for the organisation adopting work life balance practices
- The mechanisms currently in place to help employees balance work and life outside work
- The characteristics of work life balance projects (design, aim, outcomes)
- The prevailing culture of the organisation
- The quality of communication
- The perceived success factors and barriers
- The experiences of employees in terms of work/life balance

13. Employers for Work Life Balance Benchmarking Tool

Employers for Work Life Balance have developed an online benchmarking Tool adapted for small and large organisations which allows the assessing of work/life performance against four levels (identified as Gold, Silver, Bronze and Not Ranked) on a list of four variables:

- Strategy
- The business case
- Implementation
- Assessment

14. Investors in People Work/Life Balance Model

Website: www.investorsinpeople.co.uk

The Investors in People Work/Life Balance Model assesses organizations against nine indicators under the headings Culture, Strategy, Action and Effectiveness and sets out evidence statements in relation to each indicator. The principles, indicators and evidence statements can be found at www.optimusassociates.co.uk/iip_work_life_balance.htm and an Investors in People Work/Life Balance questionnaire (page 96) is available at app.greatworkplace.com.sg/data/publications/InvestingInPple.pdf

15. Work Life Research Centre – Work Life Framework Six Steps to Success

Website: www.workliferesearch.org/wl_site/wi_main_wlm2.htm

The framework includes three stages of development: Starting out, Moving Forward and Leading Edge. It also suggests six key issues for changes, which would indicate a way to put policy into practice. The six key issues are:

- a) Strategy and objectives
- b) Culture and attitudes
- c) Policies and resources
- d) Communication strategy
- e) Management
- f) Working practices

In addition, it has developed a Work/Life Policy Checklist, which includes examples of policies and practices that can meet staff and organisational demands. The checklist includes the following headings:

- Innovative work organisation
- Employee development
- Leave provisions
- Employee support

16. Work Life Balance Consultancy. The Work-Life Balance Standard

The Work/Life Balance Standard was launched in 2000 and was intended to support the Work/Life Balance Challenge Fund. It is an independent standard which measures 11 indicators under the headings of: Leadership and Commitment, Systems and Planning, Action and Review and Assessment. Organisations successfully assessed against the standard are permitted to use an accreditation symbol and must undergo re-assessment periodically.

UNITED STATES

17. Alliance for Work/Life Progress – Work/Life Effectiveness

Website: www.awlp.org

The Work/Life Effectiveness Categories address the most important intersections between the worker, his or her family, the community and the workplace. The categories are:

- Workplace flexibility
- Paid and unpaid time off
- Health and well-being
- Caring for dependents
- Financial support
- Community involvement
- Management involvement/Culture change

18. Boston College Center for Work and Family – The Excellence Index

Website: www.bc.edu/centers/cwf/standards/overview/index/meta-elements/pdf/ExcellenceIndex10_03_03.pdf

The Excellence Index outlines a model to help organizations turn values into practice. It sets out a framework for Work/life implementation. Seven elements of the Index are Leadership, Strategy, Infrastructure, Accountability, Relationship Building, Communication and Measurement. Assessment against the seven elements is guided by questions.

The Index reflects a view that there is not one path to excellence, but that programs and policies depend on the corporate culture, the economy, the stage of an organisation's development, the type of industry, the location and the workforce profile.

The Excellence Index is a free self-assessment tool. It includes a set of indicators and asks participants to rate on a five-point scale, the extent to which these have been established within the organisation. After completing the Index, participants receive a complimentary summary of the results; complete with charts and graphs revealing a total score and numerical averages for each area. For a fee, results

are added to a confidential data base. That allows participants to benchmark their own results against aggregate data.

19. Families and Work Institute – Family Friendly Company Index

Source: Galinski, E., Friedman, D. & Hernandez, C. (1991). The Corporate Reference Guide to Work Family Programs, Families and Institute.

This influential index was devised to answer the questions:

- What does a family-friendly company look like?
- What are the features of a meaningful response?
- How do our policies and programs compare with those of other companies – both in terms of individual features and the overall packaged response?

The criteria for the index include:

- The impact of the program – that is, its capacity to reduce work/family conflict;
- Its coverage, or how widely available it is;
- Its institutionalization, that is, whether or not the programs are written into policy or ad hoc and informal;
- The commitment of resources – money, people, time and leadership – that the program requires;
- The level of effort that implementation of the program requires; and,
- The innovativeness or degree to which a program is cutting-edge or uniquely tailored to meet the needs of a particular workforce.

The seven categories identified were:

- Flexible work arrangements
- Leaves
- Financial assistance
- Corporate giving/community service
- Dependent care service
- Management change
- Work-family stress management