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Work-Life Balance in Small to Medium Business

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Abstract

Electus is a leading training provider that has been operating in South Australia since 1985. Electus' core activities consist of delivering nationally accredited training in Information Technology and Business, as a Registered Training Organisation (RTO). Electus has plans to expand interstate to Melbourne and Sydney. The challenge for Electus is to consolidate its current operations in South Australia while preparing for expansion. While the directors are well aware of how to achieve this expansion, additional work-life balance policies, procedures and strategies will assist the directors to manage the organisational challenges brought about by this initiative.

The major benefits of introducing a work-life balance programme will be the retention of high quality employees, the efficient delivery of products and services to a growing client base, and thus enabling Electus to maintain its competitive position in its industry.

Key Words: work life balance, change management

Introduction

Electus is a small to medium business enterprise established in 1985 in Adelaide, South Australia. The organisation is involved in the development and sale of learning programs for children four to twelve years of age in eighteen countries, through a combination of joint ventures, licence agreements and distributors. A second branch of Electus is a Registered Training Organisation (RTO) with in-house training programs in Information Technology (IT) applications and programs. The RTO is supported with qualified trainers on a contractual basis. Electus operates in South Australia and fits the definition of an SME.

Electus currently operates with a core group of ten personnel (two directors and eight employees). Electus has plans to expand interstate within the next twenty-four months to Melbourne and then to Sydney. This expansion will increase the demand for human resources such as administration, finance, communications, logistics and personnel. Initial conversations with the CEO suggest that the organisation will need to address these issues and she welcomes new insights about work-life balance for its employees.

Questions that will require addressing are:

- What is work-life balance?
- How is work-life balance perceived and achieved (if it is achievable) within organisations?

The expression 'work-life balance' was first used in 1986 in the US (although it had been used in the UK from the late 1970s by organisations such as New Ways to Work and the Working Mother's Association) to help explain the unhealthy life choices that many people were making - they were choosing to neglect other important areas of their lives such as family, friends, and hobbies in favour of work-related chores and goals ('Work-life balance' 2008). Work-life balance is about people having a measure of control over when, where and how they work. It is achieved when an individual's right to a fulfilled life inside and outside paid work is accepted and respected as the norm, to the mutual benefit of the individual, business and society (Employers for Work-Life Balance 2008).

Literature Review

A number of organisations from the public, private or not-for-profit sectors have considered work-life balance. Recent reports and surveys into work-life balance have highlighted that organisations from the public, private or not-for-profit sectors will benefit from incorporating work-life balance initiative strategies within the work environment (Managing Work-Life Balance International 2007; Employer for Work-Life Balance 2008). Some of the organisations listed in Managing Work-life Balance International (2007) include: ANZ, Australia Post, The Cancer Council of NSW, GE Commercial Finance, Frankston City Council, Monash University, NSW Treasury, Vic Roads and Westpac.

In more general terms, the benefits can include (Georgia Institute of Technology 2002, Asia Pacific 2007, Managing Work-Life Balance International 2007, Employer for Work-Life Balance 2008):

- Increased productivity
- Improved recruitment and retention
- Lower rates of absenteeism
- Reduced overheads
- An improved customer experience
- A more motivated, satisfied and equitable workforce.

For example, Commonwealth Government of Australia (EOWA 2007, p. 1) states "for every \$1 a company spends on flexible work or family benefits, there is a return of \$2 through to \$6 through reduced absenteeism, increased motivation and higher rates of retention".

What work-life balance is not?

To provide a more complete picture of work-life balance, consider what it is not. Work-life balance does not mean an equal balance. With only so many hours in a day, attempting to create equal balance between work, family and personal needs can be unrealistic. Moreover, a person's best individual work-life balance will vary over

time. What will be right for a single person will differ from a married person as will differ from those with children. There is no perfect one-size fits all - balance should be strived for over time by each person. We all have different priorities and lifestyle.

Thus, work-life balance can be further described as one striving for achievement and enjoyment, values which can be addressed in the work environment (Georgia Institute of Technology 2002, Asia Pacific 2007, Managing Work-Life Balance International 2007, Employer for Work-Life Balance 2008). When work-life balance is perceived to be an important issue in the workplace, employers, employees and customers benefit. Benefits translate into the productivity gains noted.

The core elements of a work-life strategy

Work-life balance has been described above. How can it be achieved? In general terms this research will demonstrate that it can be achieved through initiatives such as:

- Linking work-life issues with organisational values
- Having a senior manager as a 'champion' of the strategy
- Communicating policies and programs that support the change process
- Encouraging supervisors to be supportive of employees and to find solutions to issues that work for both the employee and the organisation

Consider this achievement in more detailed terms. The following working patterns have been tried and tested by employers and proven to work. Firstly, the *organisation* should consider flexible working patterns (Employers for work-life balance 2008, p. 1).

- Flexitime variable start and finish times
- Compressed work week working full-time hours in 4 days
- Part-time working working less than full-time contractual hours
- Job sharing where two people split one job
- Annualised hours allows flexible working patterns throughout the year
- Teleporting or home working working remotely or from home
- Term-time working working only during school terms

At an *individual* level, individual development plans and appraisals allow companies to review work-life balance on a regular basis, to plan ahead for busy periods and make adjustments before problems arise:

- Individual development plans and regular appraisals
- Coaching or mentoring can be done by colleagues or by external providers
- An 'open door' approach to problems establish good guidelines so that business and personal needs can be met.

In addition to statutory minimum requirements relating to holiday leave, parental leave, and time off for dependants and maternity leave, a firm can opt for enhanced leave such as paid paternity leave, and additional forms of leave such as career breaks for carers, study leave and additional holiday leave in lieu of pay or other employee benefits.

A firm can move beyond the individual employee. In addition to flexible working patterns and additional leave, it can help employees with caring responsibilities in the following ways:

- Information on local care providers
- Sponsorship of local day care centres
- Loans or allowances to help pay for eldercare
- Childcare vouchers

(Employers for Work-Life Balance 2008)

Western Society

Now, let us step back from the individual and the organisation. Western society has moved through the industrial revolution, technological revolution and the information age. Maslow's hierarchy of needs illuminates what has happened in these movements – only as each of the five stages of needs are catered for and are met, can there be flexibility for the next level to be accessed. For example, at the safety needs stage, people in Australian culture embrace protection from elements, security, order, law, limits and stability. With these needs met, they can embrace the next stage of needs, belongingness and love including work group, family, affection and relationships. In other words, a work-life balance space is created to evolve and will continue to do so as society and people evolve (Maslow 1954).

In addition, a consideration of generations helps to understand work-life balance issues. Pre-Boomers were born in the era 1927-1945 and were primarily concerned with working and providing for their daily livelihood and families. They were the generation who lived through the great depression. Boomers are the 1946-1964 generation and were born into a world where they were beginning to enjoy the benefits that their parents struggled to provide for them. They experienced a better life style, with more luxuries such as television and telephone in the home. They also had access to improved education and medical facilities. Boomers had more time to explore life and work.

Next, Generation Xers born 1965-1981 grew up with their Boomer parents wanting Gen X to have a better life style than they had. Boomers ensured their Gen X children received this better life style. Generation Y, Nexters or Echo Boomers born after 1982 grew up with the benefits from the previous generations. Gen Ys and Nexters take 'life style' as their right with an expectation of having the benefits that previous generations 'worked' to achieve as a norm to their way of life. Gen Ys and Nexters expect this as the basis of their life. A Gen Y when asked what they considered poverty to be in today's society replied, "Not having a mobile phone" (Goldsmith 2008).

Throughout the years of these generations, technology has brought improved life styles and a closing of the gap between time frames of supply and demand of products and services. What once took days to deliver now takes seconds with internet communications. The world has become 'small' and the pace of life has quickened, with people required to do more in a shorter time frame. This change has translated into output levels increasing on a daily basis assisted by an ever faster interfacing of systems delivering products and services.

Data Collection Methods

The Electus directors chose seven respondents to be interviewed and surveyed (two directors and five employees). Each participant received information two business days prior to being interviewed about this project. At a prearranged time and date one to one in-depth interviews were conducted for each of the participants for 30 minutes in a room which was private and away from the general business. After the one to one interview each respondent filled in a questionnaire

Research consent forms of the Gibaran Learning Group were completed by each participant to agree that all information given would be confidential and that their identities would remain confidential. The information gathered is analysed next.

Research Findings

Work-life balance at Electus

The background above provides a foundation for looking at work-life balance in Electus in particular. A director at Electus admits that when the business started in 1997, work-life balance was not an option. It was about getting business, becoming established and gaining creditably in the market place. Furthermore, as a start up business it was 'work all the time'. It has only been in the past six years that work-life balance has been considered, with the development of policies and strategies to address this area. Smaller organisations like Electus face particular challenges when introducing or improving work-life balance policies. Time and cost constraints can seem prohibitive, particularly with a smaller staff whose skills are essential. (Employers for work-life balance 2008).

The Electus directors are women and so they believe they have greater empathy with their employees to introduce work life balance conditions at Electus, compared with male directors of other businesses. Electus is like a family business with a 'family feel' about it, and employees are able to approach directors as the need arises. In their small business, the directors believe they can more easily and rapidly respond to the day to day issues and needs of their employees and the business.

Electus has a five year 'living' business plan where the five-yearly plans are broken into yearly segments and further broken into ninety-day plans, with an annual strategic planning day held in July. The directors have developed this model over time which they continue to review, monitor and refine in line with current market trends, business needs and employees' work-life balance requirements. The directors understand their employees' expectations and strive to create a realistic balance between expectations and requirements. They believe that their changes have been successful with the employees who have been with Electus on average more than six years.

Work-life balance measures at Electus

What work-life balance measures does Electus incorporate in the modern work and business environment? The findings indicate that current work-life balance practises at Electus are not documented. The Directors communicate these to employees and have developed them over past eight years. Today these benefits include:

Employee development plans. Yearly development plans for each employee covering both personal and professional requirements, are in place with reviews conducted six monthly. In line with employees' yearly development plan, Electus allocates a budget for each employee for this purpose. This is in keeping with policies of attracting and retaining high quality people. Current employees have been with Electus greater than 6 years.

Open door policy. An open door policy provides each employee with direct access to the directors. Combining this with a 'family feel' to the business has proven to be successful for keeping open communication between staff and the owners of the business.

Flexible work hours. Directors believe there is an order to work-life balance with family first, work second and then one's personal life. Their reasoning is that if family is not OK then the rest will suffer. Again, there needs to be a balance in all things.

Core hours worked. To assist in work-life balance, the directors monitor employees start and finish times. They encourage employees to work their core hours and leave at the appointed time. The directors believe that the work needed to be done can generally be achieved in core hours. The need to work beyond core hours would arise on only a few occasions. When this was required, flexi time would apply where they would be provided time in lieu.

Annual leave. The directors ensure employees take annual leave. This assists with attending to personal quality time and is vital to maintain the quality of work-life balance within the work environment and personal life. Annual leave is a time for employees to give more focus to their personal needs and requirements. To ensure employees operate to the best of their abilities and maintain their high skill levels, annual leave is viewed as part of the business' investment. The return on investment is seen in the employees' enthusiasm and continued high quality output in the work place.

Employees cross trained. Electus believes that supporting employees with their family commitments ensures a flexible work team. Employees are cross trained so that two people are paired together to learn each other's roles. The two-fold benefit is employees find this stimulating and employers find this beneficial to the organisation. This is seen as a win-win situation - a mutually beneficial arrangement.

Special leave. If a personal health related need arises, the Directors and employee negotiate a flexible and workable outcome. Sometimes this has not been in the best interest of the business in the short term, even though it has been in the best interest of the employee. However, in the long term it has proved beneficial to all parties concerned and it has created greater loyalty to Electus among employees with its demonstration of the directors' real commitment to the employees' work-life balance.

Social atmosphere. Generally employees meet for breakfast daily at Electus prior to commencing work at around 8 am till 8.30 am on weekdays. As well, employees generally lunch together and there is a fully equipped kitchen for employees to use

with tea, coffee, sugar, milk and biscuits supplied. Socially the team get together Friday evenings after work. A number of employees play volley ball once a week and this assists in cementing a closer relationship between team members. A shower has recently been installed at Electus which employees can access. Acknowledging life events adds variety to the work day routine, for example, on birthdays, the person whose birthday it is brings a cake to work for all to share. When an employee has a baby there is a celebration in the work setting with a gift of supply nappies for the baby given to the parent.

Electus is located in the Central Business District (CBD) in Adelaide, Australia, where vehicle parking is limited and car park fees high. Electus provides onsite car parking to employees at no cost. This assists employees with stress free access (no parking fines for expired parking) to the workplace.

Information Technology (IT). The IT hardware at Electus is upgraded every two to three years and software support is monitored on a daily basis. With the 'speed' of business ever increasing, the directors understand it is important to provide infrastructure that supports employees and the organisation to remain competitive in the global market place.

What employees have to say about work-life balance at Electus

Positive areas in the work environment. Employees agree that there is a positive work environment at Electus - for them, Electus is a good place to work and is a good employer. Those interviewed agreed flexible work hours were beneficial to their work-life balance and they acknowledged that this was a beneficial two-way arrangement between employee and employer. Work-life balance is the responsibility of both employers and employees and Electus supported and demonstrated commitment to work-life balance. The interviewees enjoyed coming to work each day. Electus builds relationships with its staff. 'We are not just employees because the link goes beyond this and includes family and personal needs.'

Areas for addressing within the work environment. Electus employees indicated that they wanted more clarity with regards to work-life balance and those policies and procedures should be formally documented. Verbal communication on work life balance issues seems to differ at times, and from staff to staff, causing some confusion. This could be sorted out if policies were documented. Other areas included three items in particular. Firstly, explore the possibility of working from home, that is, having a remote office. With today's technology in place and depending on the type of job function involved, the possibility of working from home two or three days a week could be achievable.

Next, it was suggested that the Directors explore the possibility of associations with child care facilities, thus assisting working mothers and return to work at Electus. Employees expressed the stress felt with the present economic trends such as high interest rates and that they felt a growing need for parents (mothers) to return to work earlier after child birth so as to cope with the financial pressures experienced daily. What form the association with a child care facility would take was unclear, however employees were willing to explore options with the Directors.

Finally, it was suggested that Directors consider the possibility of paid maternity leave and paid parental leave. This was an unclear area for some of the participants, yet felt that it was an area that needed to be explored with the Directors. It may not be viable for the small organisation at this present time, however, it could be addressed as a future benefit of working at Electus.

Electus survey results on work-life balance 2008

The results of the survey of seven employees at Electus are shown below. They are provided to confirm the impressions gained from the interviews that have been described above and to help other organisations considering a survey of their employees.

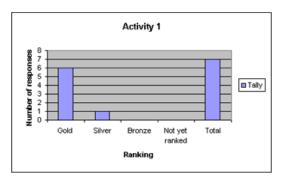
Assessment Results 5. Over all rating of organisation - Surveys 1. through 4.

Completed Survey Results based on responses to Surveys 1. through 4. above.

Survey 1. Business case - Building the Business Case for Work-Life Balance

The organisation is able to clearly articulate the business reasons for developing and implementing work-life strategies.

Ranking	Tally
Gold	6
Silver	1
Bronze	
Not yet ranked	
Total	7



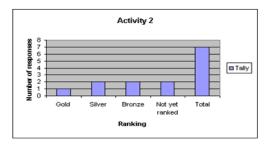
Comment:

Participants agree with the statement

Survey 2. Strategy - Work-Life Strategy

The organisation has a well developed plan for work-life balance which is clearly linked to the broader business and HR strategy.

Ranking	Tally
Gold	1
Silver	2
Bronze	2
Not yet ranked	2
Total	7

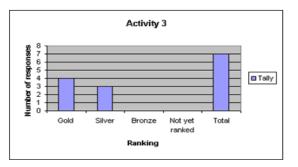


Comment: Some participants unclear, an area to be addressed

Survey 3. Implementation - Implementation

The organisation's commitment to work-life balance is visible in both policy and practice.

Ranking	Tally
Gold	4
Silver	3
Bronze	
Not yet ranked	
Total	7

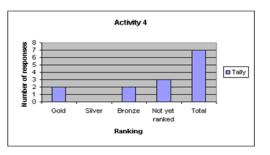


Comment:Participants agree with the statement

Survey 4. Assessment - Assessment

The organisation monitors the impact of its work-life strategy on business both qualitatively and quantivitely.

Ranking	Tally
Gold	2
Silver	
Bronze	2
Not yet ranked	3
Total	7

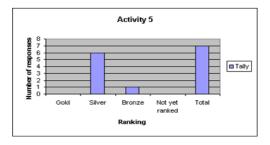


Comment:Some participants unclear, an area to be addressed

Survey Results 5. Completed Survey Results based on responses to Surveys 1. through 4. above.

Overall rating of the organisation.

Ranking	Tally
Gold	
Silver	6
Bronze	1
Not yet ranked	
Total	7



Comment:

A positive overall ranking with room for improvement.

Conclusion

During the course of this project, Goldlock Consultancy Pty Ltd has been supplying the Electus directors information about work-life balance to assist the directors to gain a greater understanding of work-life balance issues and trends, so the directors could craft and execute effective progressive work-life balance strategies throughout the Electus organisation. For Electus to attract and retain high quality employees while continuing to deliver value to its customers, work-life balance will continue to be a growing significant trend into the future. Electus will more successfully attract future employees who align themselves with Electus' progressive work-life balance policies and strategies.

This will in turn enhance the organisation's operation including the planned interstate expansions. For Electus to consolidate its business in South Australia, while planning and preparation is currently being crafted for launches into the Melbourne and Sydney markets, Electus will require employee support and involvement. This support and involvement will need to be sought to ensure that expectations are met; managers must become organisational change leaders.

The directors are aware that some employees may still choose not to be part of this process and elect not to remain with Electus. Certain personality types thrive on expansion challenges while others find them too stressful and prefer a more stable work environment. Work-life balance must extend beyond implementation to include measuring the cost benefits to the organisation and identifying continuing improvement opportunities, thus gaining a greater understanding of work-life balance and return on investment impact.

Recommendations

The recommendations arising from this research project into Electus work-life balance philosophy and practices are:

• Review current work-life balance policies and procedures to ensure these are aligned with policies and strategies for this current millennia.

- Continue to monitor current work-life balance strategies within the company so as to remain progressive and effective.
- Work-life balance will continue to be part of the strategy development process with the aim of linking into the organisational objectives.
- Formalise a check list for effective work-life balance to be implemented throughout the organisation.
- Formalise the documenting of policies and procedures for work-life balance within the organisation in the head office in South Australia and in preparation for future interstate expansion. This will increase user awareness and involvement in identifying current and future work-life balance issues and trends for the company, employer and employees.
- Post-implementation support of work-life balance can ensure ongoing benefits to all stakeholders.
- Examining the outcomes of work-life balance and implementing improvement opportunities will facilitate learning from past mistakes; Electus can correct any imbalances which will generate greater user confidence and support.
- The Human Resources department to review and identify issues and processes required to be implemented so that realistic and appropriate structures and policies can be implemented in the work place environment regarding such things as commitment and resources. This will help achieve work-life balance for employees and the organisation and allow for analysis of the cost benefit ratios. This will in turn raise the awareness of Electus stakeholders of work-life balance trends for recommendation of changes required.

As the organisation moves to the next phase of preparation to open offices in Melbourne and Sydney, Electus will need to move from a 'family feel business' to a national company and this expansion will require Electus to embrace a more business like approach.

Overall, the benefits to Electus will be evident in the organisation's ability to move away from traditional management styles to one that integrates socio-cultural aspects while successfully implementing work-life balance with operational change, whilst delivering the benefits of an increased presence in the market place leading to increased market share.

Implementing a checklist for making work life balance work

Looking for a checklist that would effectively identify the need for an organisation to address the issues involved with making work-life balance work in the every day work environment, the following is recognised as an effective tool for implementation (Labour Relations Division Department of Consumer and Employment Protection 2007). Depending on an organisation's size, this will determine the organisational response to the cost benefit ratio of such an implementation and to what extend the implementation will take place.

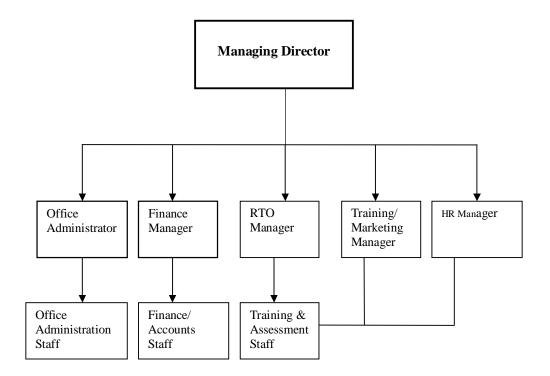
The checklist below was presented to the directors at Electus with the request to review and make comment.

Part A – An overview Step one -Identify the work life needs of employees Step two -Assess what will work in your organisation Step three -Document your arrangements Step four -Establish processes to measure success Step five -Support and educate managers and supervisors Step six -Communicate your work life strategy Step seven -Make flexible work standard practice Part B - Developing a work-life balance strategy ☐ Identify the work life needs of employees Conducting a work-life balance survey ☐ Assess what will work in your organisation • Undertake a cost-benefit analysis Trial and see • Calculating the cost of paid parental leave ☐ Document your arrangements • Addressing legal issues • Develop work life policies ☐ Establish processes to measure success Part C - Making work-life balance 'normal' practice ☐ Educate managers about the business imperative for work life balance ☐ Provide training and support for managers ☐ Provide simple processes and procedures ☐ Encourage managers to use flexible work options ☐ Reward managers who actively encourage work life balance ☐ Communicate regularly • Communicate to new employees • Communicate by example Communicating encourages return to work ☐ Use work-life balance as a recruitment tool ☐ Acknowledge key life events ☐ Celebrate flexible work arrangements ☐ Include a commitment to work-life balance in job descriptions ☐ Incorporate work life balance into performance management

☐ Advertise jobs as available on a part time basis as applicable to your organisation

☐ Keep your work life balance strategy up-to-date

Appendix A. Electus Organisational Chart Adelaide Australia 2008



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