

# balance sheets

A series of information sheets for employers interested in helping employees balance their work, family, and personal responsibilities

This series jointly produced by:



The electronic conversion of the Balance Sheets series made possible by:

**ChevronTexaco**

Initial funding to launch the Balance Sheets series provided by:



Additional support for the research and writing of this series provided by:



---

*Reproduction by permission only.*

---

Center for Work & Family  
at Boston College  
140 Commonwealth Avenue  
St. Clement's Hall, Rm. 128  
Chestnut Hill, MA 02467  
ph: 617-552-2844  
fax: 617-552-2859  
cwf@bc.edu  
[www.bc.edu/centers/cwf/](http://www.bc.edu/centers/cwf/)

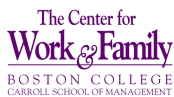
Midwestern Work-Family  
Association  
Purdue University  
1267 CDFS Bldg., Room 105  
West Lafayette, IN 47907  
ph: 765-494-6026  
fax: 765-496-1144  
cff@purdue.edu  
[www.cfs.purdue.edu/CFF/mwfa.html](http://www.cfs.purdue.edu/CFF/mwfa.html)

One Small Step  
The Bay Area Employer  
Work & Family Association  
221 Main St, Suite 300  
San Francisco, CA 94105  
ph: 415-808-4315  
fax: 415-856-0906  
info@onesmallstep.org  
[www.onesmallstep.org](http://www.onesmallstep.org)

# balance

# Xsheets™

A series of information sheets for employers interested in helping employees balance their work, family, and personal responsibilities



Copyright © 1999

Reproduction by permission only.

*“Work/life is new at Toyota, so little assessment has been done. I have found it helpful when vendors provide assessment information. We currently conduct some minimal assessment through our associate opinion survey and in focus groups. Senior management is supportive ... but warns against raising expectations.”*

Elizabeth Hall, Work/Life Administrator  
Toyota Motor Sales U.S.A., Inc.

*“A good assessment lends confidence to difficult decisions and choices. On the other hand, a poorly done assessment can provide misleading results...Careful planning and attention to established rules of employee research will create a solid foundation for a useful and accurate needs assessment.”*

(Stanger, 1993, pp. 204-205)

*“Based on what employees say during our research, we’ll get help with planning future work/life programs and a better understanding of the barriers that slow or prevent work/life initiatives from being successful. Finally, we’ll receive help developing and implementing programs and ongoing measures to ensure they meet employees’ needs.”*

Greta Schutt-McDonald  
Associate Director of Work/Life  
Kraft Foods

This issue of the Balance Sheets authored by:

Shelley M. MacDermid, Ph.D.  
Center for Families  
at Purdue University

## Assessment and Work/Life

The use of quantitative and qualitative measurement techniques to systematically assess:

- 1) employees’ needs; 2) the quality of the processes used to implement work/life initiatives; or 3) the results of work/life initiatives.

### Measuring Needs

Needs assessments are used to identify the amount, type, and locations of need throughout the workforce. These projects help work/life professionals to design and implement work/life programs, practices, and policies. For example, a child care needs assessment might indicate the number of children who need care, their ages, and parents’ preferred locations for care providers.

### Measuring Processes

Also called formative evaluations, these projects provide insight into the quality of existing programs, practices, and policies. Such projects explore, for example, why certain types of employees aren’t participating in certain programs.

### Measuring Outcomes

Also called summative evaluations, these projects assess the results of work/life programs, practices, and policies. Many different outcomes can be examined. A common example is cost/benefit analysis.

Assessment methods may include one or more of the following:

	Need	Process	Outcome
Paper and pencil or electronic surveys <i>The same closed-ended questions for all employees</i>	X	X	X
Interviews in person or via telephone <i>Questions may be open- or closed-ended; can be some variation among employees.</i>	X	X	X
Focus groups <i>A few open-ended questions are presented to a group of employees for discussion.</i>	X	X	
Existing employee records <i>Company records on demographics, work performance, or benefits use.</i>	X		X

## THE BOTTOM LINE

Here are five different strategies that can be used to assess work/life initiatives. These methods and others are described in more detail in *The Metrics Manual*, a publication of the Boston College Center for Work and Family.

1. **Value Added** - Documents changes in employee performance that are related to employer-sponsored work/life supports, then examines how improved performance can contribute to the success of particular business strategies. Best used for assessing outcomes.

Measures the following:

- Awareness of work/life benefits
- Use of work/life benefits
- Barriers to effective performance
- Perceptions of organizational support
- Appreciation of work/life benefits
- Citizenship behaviors related to business strategies

2. **Bottom Line Impact** - Applies standard accounting measures to the evaluation of work/life initiatives. Best used for assessing outcomes.

Return on Investment    Investments vs. profits (direct only)

Cost/Benefit Analysis    Direct and indirect costs vs. direct and indirect profits or savings

Productivity Measures    Costs vs. gains for health claims, absenteeism, turnover

3. **Participatory Evaluation** - Involves key stakeholders in the evaluation process. Compares actual implementation with expected accomplishments, actual impact with goals, subgroups of users. Good for assessing needs and processes.

4. **Assessing the Ripple Effect** - Focuses on the extent and ways in which policies and programs designed to have a positive impact on employees also affect supervisors and coworkers. Good for assessing needs, processes, and outcomes.

5. **Measuring Impact on External Stakeholder Relationships** - Compares the firm's relationships with stakeholders (e.g., customers, media, community groups, governments) who are aware of/affected by the company's work/life initiatives with relationships when the stakeholders were not aware of or affected by the work/life initiatives. Best used for assessing needs and outcomes.

## MODEL PROGRAMS

### **Kraft Foods, Northfield, IL**

Greta Schutt-McDonald, associate director of Work/Life, uses assessment to:

- 1) gain deeper insights into work/life issues
- 2) benchmark leading work/life companies
- 3) develop and implement action plans

Toward these goals, Kraft is participating in the Boston College National Work/Life Measurement Project, a two- year study conducted with several other leading companies.

### **BankBoston, Boston, MA**

In 1998 the bank, now part of FleetBoston Financial Corporation, used a survey to provide baseline information and to assist the bank's HR group in developing a strategy to support business performance. We interviewed Martha Muldoon, Senior Human Resources Consultant, about the experience.

#### ***Why did you decide to do a survey?***

"We felt we had a solid work/life program, but it was more a collection of programs than a comprehensive strategy. We were committed to making sure our efforts were appropriate for our workforce and our business."

#### ***Were you worried about raising expectations?***

"We discussed raising expectations quite a bit. Our communications both in asking for responses and in describing results were very clear on this point. We focused on the importance of listening to employees in planning for the future; that by participating, individuals could help us understand what is good about working at BankBoston - and what things could be improved. We talked about our objective of gathering information to form a baseline and that this was just one of many resources we would use in decision making. One thing we did commit to was sharing the results through a highlights brochure mailed to all employees."

#### ***Has the assessment been worth its effort and expense?***

"I think our return on investment on this project was significant. We learned a lot about who we are as a company and how work/life issues are affecting us. Solidifying the issues, prioritizing them and 'confirming hunches' were meaningful tools to work with in evaluating options for future opportunity and investment. We were able to use the results in several ways including educating senior management about the importance of these issues and the connection to managing people and business strategy."

---

## CONSIDERATIONS FOR EMPLOYERS

---

**Be sure you want to conduct an assessment before you do so.**

Results assessments don't always turn out as expected and they don't always lead to change. If you aren't prepared for either of these outcomes, you might be wise to delay.

**Plan your assessment with your primary audience in mind.**

Who are you trying to influence? What do they care about? The answers to these questions should be tightly linked to what you choose to measure.

**Make sure the outcome matches the intervention.**

If you are trying to evaluate a specific program or policy, focus measurements on that program or policy. It is probably unrealistic to expect change in the overall corporate culture, for example.

**Use multiple sources of information. Use interaction with the system as an opportunity to gather information.**

Examples:

- exit interviews
- attendance at seminars by topic (brown bags)
- submitted suggestions
- email traffic to work/life program and in employee discussion groups

**Sampling is everything**

Don't forget to make sure that important subgroups are included among your respondents, even if you have to go to special lengths to reach out to them. Examples might include employees with infants or gay and lesbian workers.

**Check in regularly**

The only way to accurately track change over time is to make data gathering a regular event.