

**BOSTON COLLEGE CENTER FOR WORK & FAMILY**  
**CARROLL SCHOOL OF MANAGEMENT**

STANDARDS OF EXCELLENCE IN  
WORK/LIFE INTEGRATION PROJECT

# EXCELLENCE INDEX

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## INTRODUCTION

While organizations use a variety of assessment techniques to measure the extent to which they are meeting their goals and objectives, few have assessed their overall work/life strategy or the extent to which this strategy is linked to other aspects of their business. The Excellence Index is intended to help your organization assess its strengths and weaknesses in the area of work/life, to compare this assessment to other leading organizations, and to use the results of this assessment for future planning efforts. It will also allow your organization to set its goals regarding work/life excellence, while at the same time maintaining and strengthening its business objectives. The Excellence Index is one component of the Standards in Work/Life Integration Project, and is a starting point for your organization to reinforce work/life as a business essential.

Specifically, the Excellence Index will allow your organization to:

- conduct a self-assessment of how it is doing in terms of work/life;
- learn about its work/life strengths and weaknesses; and
- plan future strategies based on specific work/life information.

Findings from the Index can be used as the basis for internal discussions, to benchmark work/life processes with other organizations, or to make work/life comparisons at different points in time.

Many efforts at measuring work/life have included checklists of specific programs, with credit given for the provision of different types of benefits. Yet these efforts have not addressed the more difficult questions of where leaders stand with respect to work/life, whether work/life is linked to business strategies, or the types of relationships that are being built to further work/life in the organization. Similarly, areas of infrastructure, accountability, communication, and measurement have not been adequately assessed.

Please note: the Excellence Index is not designed to give organizations the opportunity to showcase their work/life efforts, and the information will not be used to develop "best of" lists or to give awards. Rather, the instrument will help you pinpoint work/life areas where your organization is strong or weak, and to develop plans to address weaknesses.

The Index uses terminology that is relevant for those in different functional areas, and therefore can be used to stimulate conversations about work/life issues among those representing disparate interests. It is intended for organizations of all sizes, in different geographic regions, and across a variety of industries. Similarly, the Index can be applied to the entire organization, or to individual departments or business units.

## INTRODUCTION (CONTINUED)

When the Index is completed about separate divisions of the organization, the results can be used to compare sites, highlight parts of the organization that are particularly strong in specific areas so they can be used as role models, and identify areas that need improvement. Likewise, the Index can be helpful to assess differing views during times of organizational transition, such as mergers, downsizing, or expansion.

When assessing work/life efforts in an organization, there are many levels that could be addressed, including what the organization is doing, who is involved, the quality of the efforts, and the impact of these efforts on the organization.

The Excellence Index focuses on the first two areas - that is, who is involved in work/life in your company, and what are they doing? This instrument does not focus directly on the quality or impact of these efforts, and therefore should be considered a first step in assessing work/life in your organization. It is anticipated that future assessments will measure other aspects of work/life, and that the combined measurements could be used to formulate a comprehensive picture of work/life efforts.

### **Who should complete the Index?**

Depending on how the Index will be used in your company, you may choose to have different individuals complete the Index:

- If the Index is intended to be an overall assessment of the entire organization, it should be completed by a company representative with sufficient knowledge of work/life within the organization. In some instances, this person may decide to consult with others, in order to fill in missing information or to present a consensus view of the organization. This completed Index will be considered to be the official view regarding where the organization stands in terms of work/life issues, and will be used to benchmark with other organizations. As more companies complete the Index, it will be possible to compare your scores with other organizations in similar industries or geographic locations.
- If your organization would like to use the Index as an internal comparison tool to contrast the views of those in different functional positions or geographic locations, you may choose to have additional members of the organization complete the Index. These may be others with work/life responsibilities, or you may want to obtain the perspectives of those in different levels of the organization in non-work/life functions.

## INTRODUCTION (CONTINUED)

### **How to complete the Index**

The Excellence Index can be used to assess the entire organization, a geographic location (e.g., United States only, or a location within the U.S. or another country), or an individual business unit or section of the organization. It is very important for you to use the same reference group throughout the Index. For example, in the leadership section, the term "leaders" refers to the top leaders of the unit that you are assessing. Thus, if you are completing the Index about the entire organization, the "leaders" you rate should be the senior management team (including the head of the organization). However, if your assessment is about a separate business unit, you should only assess the head or heads of that unit.

### **Confidentiality**

All of the information that you provide in the Index will be kept strictly confidential, and will only be seen by members of the Standards of Excellence Research Team. At no point in time will your information be linked directly to your organization. If your organization chooses to receive a Benchmark Report that compares your data to other organizations, you will be the only one who is provided with this report. Remember, the Index is a self-assessment and planning tool that is intended to assist your organization, not to provide information to others outside your organization.



## DEMOGRAPHIC INFORMATION (CONTINUED)

Primary Business Type (please select one):

- |   |  |   |
|---|--|---|
| <input type="checkbox"/> Academic (College/University)    | <input type="checkbox"/> Entertainment/Sports            | <input type="checkbox"/> Petroleum, Coal Products |
| <input type="checkbox"/> Aerospace & Defense              | <input type="checkbox"/> Food & Beverage                 | <input type="checkbox"/> Pharmaceuticals          |
| <input type="checkbox"/> Agriculture                      | <input type="checkbox"/> Health Service                  | <input type="checkbox"/> Professional Services    |
| <input type="checkbox"/> Automotive, Transport Equip.     | <input type="checkbox"/> High Technology                 | <input type="checkbox"/> Retail, Wholesale        |
| <input type="checkbox"/> Banking                          | <input type="checkbox"/> Insurance, Real Estate, Finance | <input type="checkbox"/> Telecommunications       |
| <input type="checkbox"/> Chemicals                        | <input type="checkbox"/> Manufacturing                   | <input type="checkbox"/> Transportation           |
| <input type="checkbox"/> Consumer Products (Durables)     | <input type="checkbox"/> Materials, Construction         | <input type="checkbox"/> Utilities                |
| <input type="checkbox"/> Consumer Products (Non-durables) | <input type="checkbox"/> Media                           |   |
| <input type="checkbox"/> Energy                           | <input type="checkbox"/> Mining                          |   |

Other; specify: \_\_\_\_\_

**Before completing the Work-Life Excellence Index, you will need to specify which area of the organization you will be rating, and be sure that all of your answers pertain to the area of the organization that you indicate below (check one):**

- Entire organization
- United States divisions only (if global organization)
- Corporate Headquarters
- A region/division/subsidiary; specify: \_\_\_\_\_
- A plant site or location; \_\_\_\_\_

## ESSENTIAL ELEMENTS

*The elements are the fundamental building blocks that help organizations turn values into practice in a way that fosters a balanced and effective organizational culture.*

### **Element 1: Leadership**

Organizational leaders recognize the complementary importance of work and life priorities for the success of the business, and integrate this approach to build a supportive work environment.

### **Element 2: Strategy**

The Work/Life strategic plan supports the vision, goals, and priorities of the organization and its employees.

### **Element 3: Infrastructure**

The organization actively supports work/life strategies through a systemic (proactive, integrated, and ongoing) rather than programmatic approach.

### **Element 4: Accountability**

Management of work and personal life effectiveness is a shared responsibility between the employer and the employee, for which both are held accountable.

### **Element 5: Relationship Building**

The organization promotes a culture built on relationships of respect and mutual prosperity with its employees, customers, and community partners, for the benefit of the shareholders (as applicable).

### **Element 6: Communication**

The organization's work/life strategy and resources are consistently and effectively promoted in communications, both internal and external.

### **Element 7: Measurement**

The organization strives for continuous improvement towards individual work and personal life effectiveness through ongoing measurement of its work/life strategies, including: evaluation, assessment, feedback, and response.

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# **EXCELLENCE INDEX**

# INSTRUCTIONS

**Note: you may want to use pencil to complete the ratings below. This will allow you to more easily alter your rating if you change your mind about an indicator.**

*Each of the seven elements is followed by a series of performance indicator statements. The following categories should be used to rate each indicator:*

|            |          |          |             |              |            |
|------------|----------|----------|-------------|--------------|------------|
| NOT AT ALL | A LITTLE | SOMEWHAT | QUITE A BIT | A GREAT DEAL | DON'T KNOW |
|------------|----------|----------|-------------|--------------|------------|

These ratings represent the extent to which each indicator has been established in the organization, business unit, or geographic location you are rating. Please circle the one response that most closely represents the extent to which each indicator has been established.

| Scale        | Rating | Definitions  |
|--------------|--------|--|
| Not At All   | 1      | No work has been done.   |
| A Little     | 2      | Very little work has been done; this work may be in the planning stage, may have been done a long time ago, or may have reached an obstacle.   |
| Somewhat     | 3      | Some ongoing work has been done, but it is not close to being completed.   |
| Quite A Bit  | 4      | More than half the work has been done, and its full establishment is anticipated in the future.  |
| A Great Deal | 5      | The indicator has either been fully established or is very close to being established, with no obstacles anticipated to its full establishment. Special rating instructions: <ol style="list-style-type: none"> <li>1. indicators that require ongoing efforts to sustain them - assign a rating of '5' if a process has been established to continue these efforts.</li> <li>2. indicators that include two or more activities - assign a rating of '5' only if your organization has established all of the activities listed in the indicator.</li> </ol> |

## INSTRUCTIONS (CONTINUED)

Some of the indicators are based on your experiences with work/life in the organization, while others ask for your perceptions or opinions. Therefore, there are no right or wrong answers. In order to be most useful to your organization, the information you provide should be as honest and accurate as possible.

**Note: If you have difficulty choosing a category because of differences among those in the unit you are rating (for example, individual leaders behave differently), please assign an 'average' rating.**

The space in the left-hand margin is provided for additional comments. These notes may assist you in future planning efforts, and will help the Center for Work & Family if you order a Benchmark Report or Customized Analyses.

| <b>ELEMENT 1</b> | <b>LEADERSHIP</b>  | <b>TO WHAT EXTENT HAS THE INDICATOR BEEN ESTABLISHED?</b> |                 |                 |                    |                     |                   |
|------------------|--|---|-----------------|-----------------|--------------------|---------------------|-------------------|
| <b>NOTES</b>     | Organizational leaders recognize the complementary importance of work and life priorities for the success of the business, and integrate this approach to build a supportive work environment.   | <b>NOT AT ALL</b>   | <b>A LITTLE</b> | <b>SOMEWHAT</b> | <b>QUITE A BIT</b> | <b>A GREAT DEAL</b> | <b>DON'T KNOW</b> |
|                  | 1.1 Leaders are working to build a culture where work/life integration <sup>1</sup> is valued.   | 1   | 2               | 3               | 4                  | 5                   | 0                 |
|                  | 1.2 Leaders communicate the importance of work/life <sup>2</sup> for the organization to other managers and employees.   | 1   | 2               | 3               | 4                  | 5                   | 0                 |
|                  | 1.3 Leaders communicate the importance of work/life to other organizations by promoting its "best practices."  | 1   | 2               | 3               | 4                  | 5                   | 0                 |
|                  | 1.4 Leaders reward those within the organization who support work/life needs and initiatives.  | 1   | 2               | 3               | 4                  | 5                   | 0                 |
|                  | 1.5 Through their behaviors (e.g., role modeling, sharing their own work/life experiences, listening, showing empathy), leaders create an environment conducive to work/life integration.  | 1   | 2               | 3               | 4                  | 5                   | 0                 |
|                  | 1.6 Leaders support work/life strategies and programs as a means of enhancing work productivity and effectiveness.   | 1   | 2               | 3               | 4                  | 5                   | 0                 |
|                  | 1.7 Leaders include work/life in an organizational recruitment and retention plan.   | 1   | 2               | 3               | 4                  | 5                   | 0                 |
|                  | 1.8 Leaders represent diverse groups, including those from different ethnic and gender groups.   | 1   | 2               | 3               | 4                  | 5                   | 0                 |
|                  | <p><sup>1</sup>'Work/life integration' is defined as: "the complementary pursuit of work and non-work goals and activities."</p> <p><sup>2</sup>'Work/life' is defined as: "Actions taken by employers and employees to help the workforce effectively handle the pressures and responsibilities of work and personal lives as a means towards meeting the organization's business goals."</p> |   |                 |                 |                    |                     |                   |

| ELEMENT 1 | LEADERSHIP (CONTINUED)   |   |   |   |   |   |   |
|-----------|--|---|---|---|---|---|---|
|           | 1.9 Leaders include those who work a variety of schedules.   | 1 | 2 | 3 | 4 | 5 | 0 |
|           | 1.10 Leaders consider employee workloads in making business decisions.   | 1 | 2 | 3 | 4 | 5 | 0 |
|           | 1.11 The leadership development process considers both organizational and individual needs.  | 1 | 2 | 3 | 4 | 5 | 0 |
|           | 1.12 Leaders trust and respect their employees as the foundation for an effective organization.  | 1 | 2 | 3 | 4 | 5 | 0 |
|           | 1.13 Managers <sup>3</sup> discuss the integration between career and life goals with employees.   | 1 | 2 | 3 | 4 | 5 | 0 |
|           | 1.14 Managers evaluate employee performance on results, regardless of work schedule or work location (e.g., telecommuting).  | 1 | 2 | 3 | 4 | 5 | 0 |
|           | 1.15 Managers are empowered to use work/life policies and programs to meet both organizational and individual needs.   | 1 | 2 | 3 | 4 | 5 | 0 |
|           | 1.16 Managers are rewarded for using work/life policies and programs to meet both organizational and individual needs.   | 1 | 2 | 3 | 4 | 5 | 0 |
|           | <p><b>Sum the circled numbers from top to bottom in each column.</b><br/> <b>Add the column numbers from left to right, and enter total in the shaded box.</b></p>   |   |   |   |   |   |   |
|           | <p><b>Scale Definitions</b><br/> <b>Not at all</b> = no work; <b>A little</b> = very little work – beginning, a long time ago, obstacle; <b>Somewhat</b> = some work, not close to done;<br/> <b>Quite a bit</b> = more than half, done in future; <b>A great deal</b> = fully established or very close</p> |   |   |   |   |   |   |
|           | <p><sup>3</sup>The term 'manager' is used throughout the Index to refer to an individual who supervises at least one other employee. In some organizations, the term 'supervisor' or another term may be used for this individual.</p>   |   |   |   |   |   |   |

| <b>ELEMENT 2</b> | <b>STRATEGY</b>  | <b>TO WHAT EXTENT HAS THE INDICATOR BEEN ESTABLISHED?</b> |                 |                 |                    |                     |                   |
|------------------|--|---|-----------------|-----------------|--------------------|---------------------|-------------------|
| <b>NOTES</b>     | The Work/Life strategic plan supports the vision, goals, and priorities of the organization and its employees.   | <b>NOT AT ALL</b>   | <b>A LITTLE</b> | <b>SOMEWHAT</b> | <b>QUITE A BIT</b> | <b>A GREAT DEAL</b> | <b>DON'T KNOW</b> |
|                  | <b>2.1</b> The organization has a separate work/life vision and mission.   | 1   | 2               | 3               | 4                  | 5                   | 0                 |
|                  | <b>2.2</b> The organization has a separate work/life strategic plan.   | 1   | 2               | 3               | 4                  | 5                   | 0                 |
|                  | <b>2.3</b> The business case for work/life is included in the organization's vision and mission.   | 1   | 2               | 3               | 4                  | 5                   | 0                 |
|                  | <b>2.4</b> Organization identifies important work/life issues for the business, the employees, and the communities in which it operates.                   | 1   | 2               | 3               | 4                  | 5                   | 0                 |
|                  | <b>2.5</b> Work/life strategies are applied throughout the organization (regardless of geographic location or section of the organization, if applicable). | 1   | 2               | 3               | 4                  | 5                   | 0                 |
|                  | <b>2.6</b> Organization's work/life strategy is directed at the broadest spectrum of employees possible.   | 1   | 2               | 3               | 4                  | 5                   | 0                 |
|                  | <b>2.7</b> Strategic plans take into account changing workforce needs (e.g., societal demographic trends, business trends, other changes).                 | 1   | 2               | 3               | 4                  | 5                   | 0                 |
|                  | <b>2.8</b> Organization creates long-term strategies to address the work/life needs of the next generation of workers.                                     | 1   | 2               | 3               | 4                  | 5                   | 0                 |
|                  |  |   |                 |                 |                    |                     |                   |
|                  |  |   |                 |                 |                    |                     |                   |
|                  |  |   |                 |                 |                    |                     |                   |
|                  |  |   |                 |                 |                    |                     |                   |
|                  |  |   |                 |                 |                    |                     |                   |
|                  |  |   |                 |                 |                    |                     |                   |

| ELEMENT 2 | STRATEGY (CONTINUED)   |   |   |   |   |   |   |
|-----------|--|---|---|---|---|---|---|
|           | 2.9 The organization uses its understanding of community resources to develop its own work/life benefits (e.g., day care centers, after-school programs, etc.).  | 1 | 2 | 3 | 4 | 5 | 0 |
|           | 2.10 Organization uses its resources (financial, human, etc.) to have a positive impact on the communities where it is located.  | 1 | 2 | 3 | 4 | 5 | 0 |
|           | 2.11 The overall culture of the organization is consistent with work/life practices.   | 1 | 2 | 3 | 4 | 5 | 0 |
|           | 2.12 Strategies are designed to create or sustain an organizational culture that supports work/life integration.   | 1 | 2 | 3 | 4 | 5 | 0 |
|           | 2.13 Work/life strategy contains the elements of a good strategic plan (i.e., makes the business case, addresses potential barriers, has measurable goals, etc.).  | 1 | 2 | 3 | 4 | 5 | 0 |
|           | 2.14 Work/life strategies and programs are developed using appropriate data sources (e.g., employee surveys, external benchmarking, research).   | 1 | 2 | 3 | 4 | 5 | 0 |
|           | <p><b>Sum the circled numbers from top to bottom in each column.</b><br/> <b>Add the column numbers from left to right, and enter total in the shaded box.</b></p>   |   |   |   |   |   |   |
|           | <p><b>Scale Definitions</b><br/> <b>Not at all</b> = no work; <b>A little</b> = very little work – beginning, a long time ago, obstacle; <b>Somewhat</b> = some work, not close to done;<br/> <b>Quite a bit</b> = more than half, done in future; <b>A great deal</b> = fully established or very close</p> |   |   |   |   |   |   |

| ELEMENT 3 | INFRASTRUCTURE   | TO WHAT EXTENT HAS THE INDICATOR BEEN ESTABLISHED? |          |          |             |              |            |
|-----------|--|--|----------|----------|-------------|--------------|------------|
| NOTES     | The organization actively supports work/life strategies through a systemic (proactive, integrated, and ongoing) rather than programmatic approach.   | NOT AT ALL   | A LITTLE | SOMEWHAT | QUITE A BIT | A GREAT DEAL | DON'T KNOW |
|           | 3.1 New work/life initiatives (programs, policies, and services) are integrated with existing programs and policies (as appropriate).  | 1  | 2        | 3        | 4           | 5            | 0          |
|           | 3.2 Sufficient resources are allocated to work/life programs (either budget or time or staff).   | 1  | 2        | 3        | 4           | 5            | 0          |
|           | 3.3 Managers receive training about work/life strategies.  | 1  | 2        | 3        | 4           | 5            | 0          |
|           | 3.4 Managers are trained to help employees work through work/life issues and conflicts.  | 1  | 2        | 3        | 4           | 5            | 0          |
|           | 3.5 Employees are educated about the availability of work/life programs and benefits.  | 1  | 2        | 3        | 4           | 5            | 0          |
|           | 3.6 Policies and guidelines to support work/life strategies are developed (as needed).   | 1  | 2        | 3        | 4           | 5            | 0          |
|           | 3.7 The organization has a set of programs and policies tailored to the needs of its employees.  | 1  | 2        | 3        | 4           | 5            | 0          |
|           | 3.8 The organization provides tools and opportunities (e.g., education, training, interpretation) for departments to implement work/life programs and policies.  | 1  | 2        | 3        | 4           | 5            | 0          |
|           | <p><b>Sum the circled numbers from top to bottom in each column.</b><br/> <b>Add the column numbers from left to right, and enter total in the shaded box.</b></p>   |  |          |          |             |              |            |
|           | <p><b>Scale Definitions</b><br/> <b>Not at all</b> = no work; <b>A little</b> = very little work – beginning, a long time ago, obstacle; <b>Somewhat</b> = some work, not close to done;<br/> <b>Quite a bit</b> = more than half, done in future; <b>A great deal</b> = fully established or very close</p> |  |          |          |             |              |            |

| ELEMENT 4 | ACCOUNTABILITY  | TO WHAT EXTENT HAS THE INDICATOR BEEN ESTABLISHED? |          |          |             |              |            |
|-----------|---|--|----------|----------|-------------|--------------|------------|
|           |   | NOT AT ALL   | A LITTLE | SOMEWHAT | QUITE A BIT | A GREAT DEAL | DON'T KNOW |
| NOTES     | Management of work and personal life effectiveness is a shared responsibility between the employer and the employee, for which both are held accountable.   |  |          |          |             |              |            |
|           | 4.1 Leaders are held accountable for balancing business goals with work/life initiatives.   | 1  | 2        | 3        | 4           | 5            | 0          |
|           | 4.2 Leaders encourage employees to use a range of work/life programs, services, and policies to achieve better work/life integration and meet business goals.   | 1  | 2        | 3        | 4           | 5            | 0          |
|           | 4.3 Managers are held accountable for implementing work/life programs and policies (consistent with organizational goals).  | 1  | 2        | 3        | 4           | 5            | 0          |
|           | 4.4 Managers and employees are responsible for working together to achieve work/life integration (consistent with organizational objectives).   | 1  | 2        | 3        | 4           | 5            | 0          |
|           | 4.5 Employees in the organization understand that some jobs, opportunities, and assignments are less conducive to better work/life integration.   | 1  | 2        | 3        | 4           | 5            | 0          |
|           | 4.6 The performance management system for managers is linked to work/life efforts and effectiveness.  | 1  | 2        | 3        | 4           | 5            | 0          |
|           | 4.7 The informal systems at the organization support work/life integration (e.g., promotions, new opportunities, etc.).   | 1  | 2        | 3        | 4           | 5            | 0          |
|           | <b>Sum the circled numbers from top to bottom in each column.<br/>Add the column numbers from left to right, and enter total in the shaded box.</b>   |  |          |          |             |              |            |
|           | <b>Scale Definitions</b><br><b>Not at all</b> = no work; <b>A little</b> = very little work – beginning, a long time ago, obstacle; <b>Somewhat</b> = some work, not close to done;<br><b>Quite a bit</b> = more than half, done in future; <b>A great deal</b> = fully established or very close |  |          |          |             |              |            |

| ELEMENT 5 | RELATIONSHIP BUILDING  | TO WHAT EXTENT HAS THE INDICATOR BEEN ESTABLISHED? |          |          |             |              |            |
|-----------|--|--|----------|----------|-------------|--------------|------------|
| NOTES     | The organization promotes a culture built on relationships of respect and mutual prosperity with its employees, customers, and community partners, for the benefit of the shareholders (as applicable).  | NOT AT ALL   | A LITTLE | SOMEWHAT | QUITE A BIT | A GREAT DEAL | DON'T KNOW |
|           | 5.1 Work/life professionals work with those in other departments to integrate the work/life function into the culture of the organization.   | 1  | 2        | 3        | 4           | 5            | 0          |
|           | 5.2 Organization collaborates with external organizations to provide effective work/life solutions (e.g., child care, elder care, after-school programs).  | 1  | 2        | 3        | 4           | 5            | 0          |
|           | 5.3 Organization contributes to the work/life field through collaboration and support for professional organizations (e.g., work/life associations, research organizations, etc.).   | 1  | 2        | 3        | 4           | 5            | 0          |
|           | 5.4 Organization communicates the importance of employee involvement in communities.   | 1  | 2        | 3        | 4           | 5            | 0          |
|           | 5.5 Organization establishes programs to facilitate employee involvement in communities.   | 1  | 2        | 3        | 4           | 5            | 0          |
|           | 5.6 Organization works with public policy makers to strengthen policies that benefit both employers and individuals.   | 1  | 2        | 3        | 4           | 5            | 0          |
|           | <p><b>Sum the circled numbers from top to bottom in each column.</b><br/> <b>Add the column numbers from left to right, and enter total in the shaded box.</b></p>   |  |          |          |             |              |            |
|           | <p><b>Scale Definitions</b><br/> <b>Not at all</b> = no work; <b>A little</b> = very little work – beginning, a long time ago, obstacle; <b>Somewhat</b> = some work, not close to done;<br/> <b>Quite a bit</b> = more than half, done in future; <b>A great deal</b> = fully established or very close</p> |  |          |          |             |              |            |

| ELEMENT 6 | COMMUNICATION  | TO WHAT EXTENT HAS THE INDICATOR BEEN ESTABLISHED? |          |          |             |              |            |
|-----------|--|--|----------|----------|-------------|--------------|------------|
| NOTES     | The organization’s work/life strategy and resources are consistently and effectively promoted in communications, both internal and external.   | NOT AT ALL   | A LITTLE | SOMEWHAT | QUITE A BIT | A GREAT DEAL | DON'T KNOW |
|           | 6.1 The business case for work/life has been clearly communicated throughout the organization.   | 1  | 2        | 3        | 4           | 5            | 0          |
|           | 6.2 Employees receive regular communications about work/life strategies.   | 1  | 2        | 3        | 4           | 5            | 0          |
|           | 6.3 Employees feel free to openly discuss work/life issues in the workplace.   | 1  | 2        | 3        | 4           | 5            | 0          |
|           | 6.4 Direct communication with work/life professionals is available to employees throughout the organization.   | 1  | 2        | 3        | 4           | 5            | 0          |
|           | 6.5 The organization shares its work/life policies, programs, and strategy with other organizations.   | 1  | 2        | 3        | 4           | 5            | 0          |
|           | 6.6 The organization acts as an advocate for work/life issues (e.g., serving on community boards, etc.).   | 1  | 2        | 3        | 4           | 5            | 0          |
|           | 6.7 The organization communicates with other practitioners through professional work/life organizations.   | 1  | 2        | 3        | 4           | 5            | 0          |
|           | 6.8 Managers communicate and listen to their employees regarding work/life issues.   | 1  | 2        | 3        | 4           | 5            | 0          |
|           | 6.9 Work/life is publicly communicated as one component of organizational identity.  | 1  | 2        | 3        | 4           | 5            | 0          |
|           | <p><b>Sum the circled numbers from top to bottom in each column.</b><br/> <b>Add the column numbers from left to right, and enter total in the shaded box.</b></p>   |  |          |          |             |              |            |
|           | <p><b>Scale Definitions</b><br/> <b>Not at all</b> = no work; <b>A little</b> = very little work – beginning, a long time ago, obstacle; <b>Somewhat</b> = some work, not close to done;<br/> <b>Quite a bit</b> = more than half, done in future; <b>A great deal</b> = fully established or very close</p> |  |          |          |             |              |            |

| ELEMENT 7 | MEASUREMENT   | TO WHAT EXTENT HAS THE INDICATOR BEEN ESTABLISHED? |          |          |             |              |            |
|-----------|---|--|----------|----------|-------------|--------------|------------|
| NOTES     | The organization strives for continuous improvement towards individual work and personal life effectiveness through ongoing measurement of its work/life strategies, including: evaluation, assessment, feedback, and response. | NOT AT ALL   | A LITTLE | SOMEWHAT | QUITE A BIT | A GREAT DEAL | DON'T KNOW |
|           | 7.1 Work/life strategy has measurable goals and objectives.   | 1  | 2        | 3        | 4           | 5            | 0          |
|           | 7.2 The organization collects work/life information (e.g., demographics, future trends, etc.) from its employees on a regular basis.  | 1  | 2        | 3        | 4           | 5            | 0          |
|           | 7.3 The organization uses the information collected from its employees to plan new programs and policies.   | 1  | 2        | 3        | 4           | 5            | 0          |
|           | 7.4 The organization measures the work/life needs of its employees.   | 1  | 2        | 3        | 4           | 5            | 0          |
|           | 7.5 The organization tracks the utilization of its work/life initiatives.   | 1  | 2        | 3        | 4           | 5            | 0          |
|           | 7.6 The organization tracks the effectiveness of its work/life initiatives.   | 1  | 2        | 3        | 4           | 5            | 0          |
|           | 7.7 The organization tracks satisfaction as part of its work/life efforts.  | 1  | 2        | 3        | 4           | 5            | 0          |
|           | 7.8 The organization tracks information related to the workload of its employees.   | 1  | 2        | 3        | 4           | 5            | 0          |
|           | 7.9 The organization examines the relationship between work/life programs and outcome measures (e.g., productivity, quality of work, etc.).   | 1  | 2        | 3        | 4           | 5            | 0          |
|           | 7.10 Cost benefit ratios or other “return-on-investment” analyses are conducted to examine the impact of work/life programs.  | 1  | 2        | 3        | 4           | 5            | 0          |
|           |   |  |          |          |             |              |            |

| ELEMENT 7 | MEASUREMENT (CONTINUED)  |   |   |   |   |   |   |
|-----------|--|---|---|---|---|---|---|
|           | 7.11 Measurement data are used to identify obstacles to implementing work/life programs and policies.  | 1 | 2 | 3 | 4 | 5 | 0 |
|           | 7.12 Research findings are used to develop and improve work/life programs.   | 1 | 2 | 3 | 4 | 5 | 0 |
|           | 7.13 Regular benchmarking is conducted to compare the organization's work/life practices with other organizations.   | 1 | 2 | 3 | 4 | 5 | 0 |
|           | <p><b>Sum the circled numbers from top to bottom in each column.</b><br/> <b>Add the column numbers from left to right, and enter total in the shaded box.</b></p>   |   |   |   |   |   |   |
|           |  |   |   |   |   |   |   |
|           |  |   |   |   |   |   |   |
|           |  |   |   |   |   |   |   |
|           |  |   |   |   |   |   |   |
|           |  |   |   |   |   |   |   |
|           |  |   |   |   |   |   |   |
|           |  |   |   |   |   |   |   |
|           |  |   |   |   |   |   |   |
|           | <p><b>Scale Definitions</b><br/> <b>Not at all</b> = no work; <b>A little</b> = very little work – beginning, a long time ago, obstacle; <b>Somewhat</b> = some work, not close to done;<br/> <b>Quite a bit</b> = more than half, done in future; <b>A great deal</b> = fully established or very close</p> |   |   |   |   |   |   |

## WHAT'S NEXT?

*Now that you have completed the Excellence Index, what's next? There are several other components that are part of the Standards of Excellence in Work/Life Integration Project.*

### **Excellence Index Database**

Your ratings will be automatically added to the Excellence Index Database, an ongoing database that will allow us to compare the ratings of all organizations that complete the Index. You may choose to order a Benchmark Report that compares your organization to the other organizations in the Excellence Index Database (see below).

### **The Summary of Results**

As a result of completing the Excellence Index, you will receive a Summary of Results report. This report will present your organization's total score and numerical sums for each element area, will translate your element raw scores into standardized scores ranging from 0-100, and will include a graph comparing the standardized scores. In addition, your organization's ratings on all Index indicators will be included so that you will have a permanent record of the Index that you completed today.

### **Benchmark Report**

The Benchmark Report is an opportunity for you to compare your ratings with the other organizations in the Excellence Index Database. This report will highlight areas where the organizations in the database are doing particularly well or need improvement, and will present charts that compare your organization's scores to the range of scores and the average element scores of the organizations in the database. Organizations who order the Benchmark Report will receive an introductory subscription to the E-HANDBOOK on Excellence.

### **The E-HANDBOOK on Excellence**

The E-HANDBOOK is a comprehensive on-line tool to assist users of the Index. It is organized according to the seven key elements, providing in-depth research and examples of employer practices. The E-HANDBOOK is an electronic, searchable database and is available only to paid subscribers who have completed the Excellence Index.

## WHAT'S NEXT? (CONTINUED)

### **Customized Analyses**

After reviewing your scores in the different element areas and benchmarking your results with other organizations, you may decide that you would like more in-depth analyses. This could include comparing your organization to others within your industry group, with similar-size organizations, or with those located in specific geographic areas. Similarly, you may request other customized analyses that would be useful for your organization (e.g., using other demographic comparisons from the Index).

You may also choose to use the Index to conduct more detailed internal analyses. The Center for Work & Family can provide assistance if you would like to have other representatives from your organization complete the Index, and would like to receive comparisons of these ratings. In addition, the Center can conduct an on-site forum at your organization.

### **Annual Trend Reports**

The Trend Reports will present information compiled in the Excellence Index Database, supplemented by lessons from cutting-edge research. Published annually, these reports will track changes over time in the work/life field and in the organizations that complete the Excellence Index. The Trend Reports will allow organizations to learn more about work/life issues in other organizations and in the work/life field, and to see how these issues change from year to year.

### **ABOUT THE CENTER**

The Boston College Center for Work & Family is committed to enhancing the quality of life of today's workforce by providing leadership for the integration of work and life, an essential for business and community success. Our vision is that companies and communities will work together to ensure their mutual prosperity and the well-being of employees and their families.

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