

balance sheets

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

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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/

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

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

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Xsheets™

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The Center for
Work & Family
BOSTON COLLEGE
CARROLL SCHOOL OF MANAGEMENT

One Small Step 

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"By combining our relocation and work/life functions, we created a strategic focus for relocation that didn't exist before. Relocation is no longer an administrative process, but demonstrates how work/life initiatives can help maximize the performance and hiring objectives of our business units."

Ann Andreasatos
Director, Work Family Programs
Fidelity Investments

"The Gap embraces diversity as one of its primary goals. We feel that most of our employees' diverse needs are satisfied through our flexible relocation policy that includes a lump sum payment to be used as the employee desires."

Debbie Cowan
Relocation Director
The Gap Inc.

*This issue of the Balance Sheets
authored by:*

Judith David,
One Small Step, and
Elizabeth Hirschhorn Wilson &
Kathy Lynch, Boston College

RELOCATION ASSISTANCE PROGRAMS

To ease the transition to a new location, employers offer a variety of services to domestic transferees and expatriates. Relocation departments are turning to work/life managers for education and collaboration as they strive to maintain work/family balance during relocation.

Saying No To A Move...Rethinking the Corporate Ladder

An increasing number of employees are passing up career opportunities and rethinking their willingness to relocate in order to accommodate other family members' needs. Spouses/partners are often reluctant to relocate and put their own careers at risk. Additionally, couples relocating are put off by the daunting task of coordinating child-care/schooling and elder care from across the country or across the globe. Relocation impacts the entire family – the employee, his or her spouse/partner, children, and extended family.

Employers are responding by designing innovative relocation programs that not only focus on the traditional needs of a relocating employee such as housing, transportation, and moving assistance, but also focus on the needs of the whole family. Companies have begun offering spousal career assistance, international child and elder-care resource and referral, and pre-relocation family consultations. As with traditional work/family programs these initiatives demonstrate respect for the life balance of the individual. Expatriates and transferees who feel connected to the company, and who feel that their families and personal lives are respected, are far more likely to succeed in their assignment.

Work/Life Relocation Issues

- In the 1995 Global Relocation Trends Survey Report, spousal career concerns were the leading reasons for turning down expatriate assignments, closely followed by other family issues and concerns about children.
- Almost three out of five respondent companies, in the Employee Relocation Council's (ERC) 1995 Relocation Trends Survey, felt that elderly dependent care concerns negatively impact an employee's ability to become productive in a new location.
- In 1994 ERC estimated the average cost of a domestic relocation to be \$45,000. In cases where the assignment fails, the company also incurs additional recruiting and training costs.

COLLABORATIVELY WORK/LIFE AND RELOCATION MANAGERS CAN:

- Develop a strategic alliance between work/life and relocation. Many work/life initiatives fit perfectly with relocation needs.
- Serve as a facilitator-educator between departments.
- Create an immediate and strong bond with the family by including them in the relocation process from day one.
- Recognize that spouses and family members are a critical source of information and assistance to potential transferees.

MODEL PROGRAMS

Andersen Worldwide in Chicago, IL, offers several relocation policies to support the families of its expatriates. Spouses are allocated an annual allowance to use at their own discretion and are also offered job research assistance. Recognizing families' concern for the continuation of a child's quality education, the company will pay for private education grades K-12.

Fidelity Investments in Boston, MA, sought to engage adolescents in the relocation process. Fidelity asked children of Boston employees enrolled in a pre-teen vacation program to create a book about the Boston and New Hampshire area for the children of relocating employees.

Hewlett Packard, in Palo Alto, CA developed a number of policies to address the unique cultural challenges that expatriate families face. The company offers three days of cross-cultural and language training to the entire family as well as spouse specific training (education or interest) designed around the new destination.

Lucas Digital Ltd., in San Rafael, CA, strives to make employees feel at home in their new city. When relocating an employee to the Bay Area, the company provides them with a relocating package that includes information on hospitals, veterinarians, how to get a driver's license, as well as several tour books of the area. Lucas also covers up to \$5,000 per employee for transportation of household goods, one-way airfare, and two weeks hotel and care rental.

Pitney Bowes, in Stamford, CT, offers internal transferees and new recruits assistance with child and elder care searches, and school system comparison through Life Balance Resources. Additional relocation benefits offered include: home buying assistance, mortgage assistance, and temporary living assistance.

Time Warner Corporate, in New York, NY, respects the importance of the family in the relocation process. The company provides all domestic transferees and one family member with a ten-day house-hunting trip; renters are allotted five days. Additionally, Time Warner Corporate will arrange for career counseling, resume preparation, and job market research for the spouse of the transferred employee. Specific policies vary by operating unit.

Watson Wyatt, in Wellesley Hills, MA, recognizes that often the families of transferees can not always immediately accompany the employee to their new home. Wyatt will reimburse employees the reasonable costs incurred in visiting their families while living in temporary living space. The company will also pay for spousal visits to the employee.

SPECIAL CONSIDERATIONS

Relocating Families with Special Needs

Part of the challenge in managing the relocation of employees who are disabled or who have an immediate family member who is disabled is recognizing that each situation is unique. Open communication is crucial from the very start, and it is important, as with all relocations, to include the entire family in the human resources process. HR

professionals will benefit from recognizing that often the employee has more information than they do, and should respond to the employee's requests with flexibility.

When Headquarters Relocates?

In cases where organizations are faced with centralizing operations or moving large groups of employees at the same time, many HR departments are finding it beneficial to establish onsite relocation centers. Employees have "one stop shopping" to all of their questions and answers. In these cases, especially, it is crucial for work/life, relocation, and other HR departments to coordinate and synchronize their efforts.

Moving a significant number of employees at one time provides a company with an excellent opportunity to update its relocation policies. In connection with its consolidation and relocation of corporate headquarters from Stamford, CT to Dallas, TX, **GTE** is providing educational and psychological counseling services to children of employees faced with the decision to relocate.

Domestic Partner Benefits

Many companies' domestic partner benefits include coverage related to relocation. **Pacific Telesis**, in San Francisco, CA, includes registered domestic partners in its definition of family. Spousal career assistance is offered to the spouse or registered domestic partner of any employee who is relocated at the company's request. Services provided include: resume writing assistance, interviewing skills, and contact for future employment opportunities. Approximately 15 to 20 individuals use this service every year.

Work/Life Relocation Issues for Singles

Although moving with a family presents its own host of challenges, moving alone can be difficult, and an employer can step in with services designed to assist the employee in connecting with a new community. **The Gap** in San Francisco transfers 250 workers each year; 88% are renters, most are single, and many are financially sensitive. A new program offers assistance with lease reviews and locating safe affordable housing.