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Improvising New Careers: Accommodation, Elaboration, & Transformation

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IMPROVISING NEW CAREERS: ACCOMMODATION, ELABORATION, & TRANSFORMATION

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Strengthening services to families with research, education, and outreach
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Faculty of Management
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&
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The Center for Families
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We are deeply indebted to the 400 men and women who shared their time and insights with us. They and we hope that other individuals and organizations will benefit from their experiences.

We also are very grateful for assistance from the following employers:

**UNITED STATES**
- Allied Signal
- ARTEL
- AT&T
- Bank of America
- Baxter Healthcare Corporation
- Butterworth Health System
- CIGNA
- Developmental Evaluation Center
- DuPont
- Eli Lilly
- Fel-Pro
- Forest Hills School Corporation
- Hewlett Packard
- Honeywell
- Howard Johnson
- IBM
- Imation
- Kaiser Permanente
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- Lucent
- Merck*
- Motorola
- Mentor Graphics
- Marriott
- Nabisco
- Paragon Re-Insurance Corporation
- St. Paul Companies
- Starbucks

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- Bank of Montreal*
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- Ernst and Young
- IBM
- Imperial Oil
- KPMG
- Lever Ponds
- Nortel
- Nova
- Ontario Hydro
- Procter and Gamble
- Royal Bank*
- Toronto Dominion Bank*
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INTRODUCTION

This report presents results from a qualitative study of 87 professionals and managers working less, by choice, for family and life-style reasons. The purpose of the research was to find out how these reduced time or load work arrangements came about and how they were working out – from the perspective of all the key stakeholders. “Reduced load” work was defined as working less than full-time, for example 4 instead of 5 days a week, and being paid less accordingly.

The study took place from August 1996 until March 1998 and involved confidential interviews with professionals and managers working less, as well as with their spouses or partners, senior managers, co-workers, and Human Resource representatives. Anonymous surveys also were sent to direct reports of the managers (who each were responsible for the work of at least three direct reports), and 70% of these (153 in all) were returned.

We present here recurrent themes across our entire sample. The first section of the report describes the degree to which reduced load arrangements we observed were successful. Subsequent sections describe findings of particular interest to the colleagues and spouses of respondents, corporate leaders, and human resources executives. Finally, we offer some general recommendations.

This report is primarily descriptive, rather than prescriptive. Readers should be cautious in interpreting the results, keeping in mind that the sample was not selected to be statistically representative of the overall population of professionals and managers working reduced load. A more technical report, as well as scholarly articles, to be produced in the future will analyze specific findings in much greater detail.

Highlights of Results

- High levels of success of reduced work load arrangements, among both professionals and managers, across a wide range of types of jobs and firms
- Reduced work load arrangements not a short-term phenomenon
- Career advancement slowed not stopped
- Women and men, parents and non-parents on reduced work load arrangements to pursue greater control over their lives and fulfillment in a variety of roles
- Success hinges on multiple ingredients acting in combination, such as:
  - individual traits and strategies
  - work group factors
  - organizational features
- It was easier to find professionals working reduced load than managers, but responsibility for subordinates was not a stumbling block to success
- Tension still there in striking a balance between what's good for employees and employers
- Three different organizational paradigms of reduced work load arrangements: accommodation, elaboration, and transformation
The Research Participants

Participants were recruited using a variety of strategies, including personal contacts with human resources and work/life administrators, “cold calls” to employers and individual professionals, and direct mail solicitations to members of organizations. Our goal was to include 40-50 professionals and 40-50 managers with direct reports in as many different kinds of jobs and industries as possible. In general no more than 3 participants were included from any one organization. A broad range of industries was represented in our sample.

The table below shows that most but not all “target” (meaning the person working reduced load) respondents were mothers or had relatively young children. They also were, in general, highly educated and experienced workers with high incomes. The average reduction in work load was substantial, with respondents indicating they were working on average 18 hours less per week than when on full-time. The average reduced load work arrangement had been in place for several years.

<table>
<thead>
<tr>
<th>Number of arrangements studied</th>
<th>Professionals</th>
<th>Managers</th>
</tr>
</thead>
<tbody>
<tr>
<td>Percent who were female</td>
<td>37</td>
<td>46</td>
</tr>
<tr>
<td>Percent with children</td>
<td>86%</td>
<td>92%</td>
</tr>
<tr>
<td>Age of youngest child</td>
<td>92%</td>
<td>94%</td>
</tr>
<tr>
<td>Age of oldest child</td>
<td>5.2 years</td>
<td>4.6 years</td>
</tr>
<tr>
<td>Age of oldest child</td>
<td>7.9 years</td>
<td>7.1 years</td>
</tr>
<tr>
<td>Percent with graduate degree</td>
<td>63%</td>
<td>49%</td>
</tr>
<tr>
<td>Experience with employer</td>
<td>13.5 years</td>
<td>12 years</td>
</tr>
<tr>
<td>Age</td>
<td>39.5 years</td>
<td>38.3 years</td>
</tr>
<tr>
<td>Salary</td>
<td>U.S. $48,576</td>
<td>$63,535</td>
</tr>
<tr>
<td>CDN $69,394*</td>
<td>$90,764*</td>
<td></td>
</tr>
<tr>
<td>Spouse or partner’s salary</td>
<td>U.S. $70,577</td>
<td>$100,821</td>
</tr>
<tr>
<td>CDN $100,824*</td>
<td>$144,030*</td>
<td></td>
</tr>
</tbody>
</table>

Percent load being worked     | 69%          | 74%      |
Hours worked per week now     | 30 hours     | 34 hours |
Hours worked per week before  | 49 hours     | 51 hours |
Number of years on reduced load| 4.8 years   | 3.8 years|

* Exchange rate $1 U.S. = .70 CDN

Unless otherwise indicated, all figures are averages.
ASSESSING SUCCESS

Our criteria for judging the success of the reduced load work arrangements were multi-faceted and stringent – many indicators are mentioned throughout this report. We looked first and foremost at whether the individual professionals and managers were happy with working less from a personal point of view. Did they get what they wanted in terms of more time for themselves and/or their families, and did they feel they were paying a fair price for what they gained? Did their careers suffer and if so, how much, and how did they feel about the tradeoffs?

Second, we looked at the outcomes from an organizational perspective. Were there costs in performance or productivity, did others in the work group have to “pick up the slack” creating an unfair overload situation, or did direct reports feel slighted? Third, we looked at how the family seemed to be faring. Were there positive outcomes reported for the overall quality of family life, for children, for the couple relationship, and did both husbands and wives report such outcomes? Finally, we looked for consistency across stakeholders in reporting positive consequences of the alternative work arrangements. How did senior managers, coworkers, and direct reports evaluate the success of the arrangements?

Interviewers rated each case, taking into consideration all accumulated data, including verbatim interview transcripts, direct report questionnaires, and the interviewer's personal field notes and observations. On a scale of 1 to 9, a 1 indicated consistently negative outcomes reported across stakeholders; a 9 indicated consistently positive outcomes. Each success rating was checked for validity by another team member.

After the ratings were completed, three groups were created: High success (ratings of 7-9), Moderate success (ratings of 5 or 6), and Low success (ratings of 1-4). Most of the cases (62%) were in the high success group, 31% were in the moderate success group, and 7% were in the low success group. The bar graph below gives more detail. There was no significant difference in the overall success of managers' and professionals' reduced load work arrangements.

![Ratings of Level of Success](image-url)
Differences Between More and Less Successful Cases

Although the overall picture from a success point of view is quite positive, it is also valuable to look more closely at what distinguishes the more successful from the less successful cases. The tables below contrast cases on family/personal and career outcomes. The two columns represent two distinct composite profiles created to illustrate differences. That is, the facets listed in each column were more likely to be reported by cases in that group but did not necessarily characterize every single case.

### Family/Personal Life

<table>
<thead>
<tr>
<th>More Successful</th>
<th>Less Successful</th>
</tr>
</thead>
<tbody>
<tr>
<td>Time, energy and mindset to enjoy kids, spouse, personal pursuits</td>
<td>Time gained seems not enough for self, and not as much as had hoped for with children</td>
</tr>
<tr>
<td>Spouse/partner shares in family work, and target feels content with spending some of time gained on chores and errands</td>
<td>Target feels spouse/partner not doing enough at home and struggles constantly to keep up with the work load at home and at work</td>
</tr>
<tr>
<td>Time gained enjoyed in activities OF OWN CHOICE (e.g., playing with kids, doing errands, seeing friends, playing tennis, volunteering in schools, etc.)</td>
<td>No improvement in couple relationship</td>
</tr>
<tr>
<td>Couple has more time, less conflict</td>
<td></td>
</tr>
</tbody>
</table>

### Career

<table>
<thead>
<tr>
<th>More Successful</th>
<th>Less Successful</th>
</tr>
</thead>
<tbody>
<tr>
<td>Able to control work load and maintain boundaries, is not overworking</td>
<td>Unable to control work load, works more than should</td>
</tr>
<tr>
<td>Feels enhanced sense of self-worth, general well-being</td>
<td>Feels ambivalent and conflicted</td>
</tr>
<tr>
<td>Is treated fairly when has to work more than normal – system is in place to compensate in time or money</td>
<td>Onus is on target to work the appropriate amount of time</td>
</tr>
<tr>
<td>Firm continues to invest in long-term potential by providing increased challenges and exposure in work assignments</td>
<td>Career is “plateaued,” opportunity to move up only when returns to full-time, development is limited to good project assignments</td>
</tr>
<tr>
<td>Feels held in high regard by boss and co-workers</td>
<td>Feels defensive with peers about reduced load status</td>
</tr>
<tr>
<td>Comfortable with trade-offs and realizes no matter how much you work, you could always do more</td>
<td>Uncomfortable when compares performance to full-time peers</td>
</tr>
</tbody>
</table>
Critical Success Factors

Respondents had a great deal to say about why they thought the particular reduced load arrangement they were familiar with had worked out well or not so well, and there was remarkable consistency of themes within and across cases. There was a consensus that success did not depend on the presence of just one or two critical factors, but rather on a convergence of multiple ingredients—the top 12 of these are shown in the chart below. For example, it was clear that strong support from the senior manager involved is nearly always essential, and that the professional or manager must be a highly skilled and talented individual with a strong track record. But there also was often a job and/or work unit configuration which was viewed as conducive to an alternative arrangement. A supportive organizational culture, or the existence of company-wide work/life policies and programs, was also seen as helpful but was not essential for success. Thus, the respondents tended to weave tales of concurrent forces and synergy operating when the reduced load arrangement was truly successful.

Although it takes multiple factors to make reduced load work arrangements fly, respondents gave most of the credit for success to the individuals who had negotiated to work differently. Eight of the top twelve factors critical to success are individual traits or behavioral strategies. However, the single most consistently mentioned item across all cases was having a supportive senior manager. The other work group ingredient which made the top 12 list was competent and supportive peers and/or direct reports. The remaining factors in the top 12 were related to characteristics of the organization. Job characteristics came up often as critical factors in reduced load work, but there was not a great deal of agreement among respondents. This is likely because of the diversity in types of jobs in the sample. Furthermore, there were clearly differences in kinds of job characteristics mentioned in the professional versus the managerial cases. These critical factors are discussed later in the Human Resources Issues section of the report. Family and personal life factors, which did not make the top 12, but which were mentioned consistently and frequently, included good, flexible child care and supportive spouses with good jobs, pay, and benefits.
STAKEHOLDER VIEWS

In general, there was a high level of agreement among stakeholders within each case of reduced load work – about the terms of the alternative work arrangement, pros and cons, critical factors, and barriers. However, a closer look at findings within each stakeholder group provides some valuable insights.

Senior Managers

Seventy (70%) of the senior managers were rated by the interviewers as highly supportive of the reduced load arrangement. This is especially impressive considering that only 40% were the senior managers who originally negotiated with the target managers or professionals to establish the work arrangement. Many of the original senior managers had acted as champions in helping put the reduced load work arrangements in place, although usually not so much on principle as out of an immediate desire to keep a particularly valued member of their team. They did not view themselves as particularly progressive or enlightened, but rather as acting in the long-term best interest of the firm. The senior managers in the managerial cases were more positive and open-minded about alternative work arrangements in general. The senior managers of the professionals, while typically enthusiastic about the particular individual involved, were more cautious about extending the availability of these options. Senior managers offered a diverse array of reasons for their approval, including...

- Don’t want to lose an outstanding performer
- There is a business need for this unique skill set that it is hard to find and keep
- Can’t afford to lose the business investment in training and development
- The company needs to adapt to changing employee demographics
- Policies and programs OR senior management had made clear the firm was supportive of alternative work arrangements in principle
- Different ways of working in the firm are more the norm than the exception
- Commitment to increasing representation of women in senior management

For the most part, the senior managers reported no negative impact of the reduced load work arrangement on the performance of the work unit and noted that individual performance of the professionals and managers had been maintained or actually improved. However, the senior managers of professionals frequently mentioned logistical problems in setting up meetings.

In general, senior managers tended to attribute the success of the reduced load arrangement to the unusually talented individuals involved ("stars"), as well as to increased loyalty, motivation, and commitment generated by the firm’s good will in agreeing to alternative work arrangements. However, many of these senior managers also described a careful process of fine-tuning and ongoing adjustment of the work assignment itself, in order to achieve the goal of reduced work load or time. In most cases, it was not a straightforward task to define or re-define a job or assignment to be less than full-time. There was considerable trial and error and experimentation which went into these customized jobs. In a number of cases senior managers actually periodically adjusted the percent load status up and down, to reflect just how much the target individuals were actually working in response to predictable or unpredictable shifts in work demand in the work unit. Although a few senior managers were actively involved in making sure the reduced load truly involved working less, in most cases it was up to the individual professionals and managers to make things work out fairly, for themselves and the firm.
The most commonly mentioned concerns of senior managers were:

- What to do to enable those working reduced loads to continue to grow professionally and advance in their careers if they don’t return to full-time.
- What to do if more and more individuals want to work reduced loads – could become a management nightmare to coordinate a host of different alternative work arrangements.
- Some jobs are not doable on less than full-time, particularly above a certain level in the organizational hierarchy.

The most commonly mentioned advantages of allowing alternative work arrangements were:

- Facilitates retention of seasoned talent, cuts losses on significant training investment.
- Recruitment advantages, especially under tight labor market conditions.
- Some individuals are actually more creative and more productive when they are able to achieve the kind of balance they want overall in their lives.

Finally, interviewers were impressed with the open-mindedness they found among many of the senior managers – to change, to a new generation of professionals and managers, and to the likelihood of new sorts of career patterns given the demographic changes in the labor force. Only a few articulated the problem of the clash of these alternative work arrangements with the traditional organizational culture (e.g., importance of “face time”) and traditional career development structures in the firm. Ultimately, the long term career trajectories of the professionals and managers studied here will likely be determined by how these senior managers come to terms with such issues.

Co-Workers

Approximately half of all co-workers who were interviewed were rated as highly supportive of the reduced load work arrangements. They had not been personally adversely affected and did not see any negative impact on the work unit. They reported that the professionals and managers had found creative ways to remain accessible and flexible in responding to shifting work demands, in spite of working reduced loads. They also found it inspiring and impressive to see such high level employees being allowed to work in alternative ways.

In 25% of both the professional and managerial cases, co-workers were definitely not supportive of the work arrangement, based on their description of negative outcomes from their own personal perspective, or from the perspective of the work group. The most frequently heard complaints were:

- Some of the work removed from the target’s job in order to create the reduced load wound up on their plates.
- In emergency situations on target days or afternoons “off,” co-workers felt that they got stuck covering for targets – with customers, clients, or senior executives.
The most frequently mentioned concerns among co-workers, regardless of how supportive they were of the reduced load arrangements, were:

- Reduced load workers are working too many hours or doing essentially the same job in less time, and are thus being taken advantage of by the firm
- Working reduced load will hurt the careers of targets
- No matter how well a particular arrangement is working out in general, when there are heavy demands, and everyone else is working over-time, targets being able to continue to set limits on their availability creates tension and resentment

**Spouses and Partners**

Over 3/4 of spouses and partners clearly viewed the reduced load work arrangements as successful from a family perspective. The most frequently mentioned kinds of benefits related to improvements in family life in general, as a result of the target individual having more time at home and being happier with the balance between work and family. The spouses made the following kinds of observations about differences in parenting behavior:

- Able to interact with kids in a different way because less pressed
- More patient and able to exercise more consistent discipline, as well as create a predictable, calm home environment
- More in touch with kids, as well as their interests, needs
- More unstructured, “play” time with children
- More opportunities to pass on values to children, for example around working out conflicts with siblings or friends

Spouses also noted ways they saw their children benefiting directly from the reduced load:

- Kids get more help with homework and other after-school activities
- Kids get more chances to play with friends outside of school, invite them over, etc.
- Kids pleased about having a parent who can attend more school functions or outings
- School and health problems noticed and attended to more quickly

And finally, over half of the spouses/partners believed the couple relationship had improved as a result of the reduced load arrangement, but not so much because of additional time together, but because the target individual was just happier and not so “pressed.” So there was less conflict, and the quality of time together was better.

The spouses who were not so sure about whether the work arrangements were working out well from a family perspective tended to have the following concerns:

- Not convinced their wives/husbands were really working less than full-time when phone calls and e-mail from home, plus going in for meetings on days off, were all taken into consideration. Were the reduced salaries really fair?
- Career progress trade-offs may significantly affect the family financial situation in the long-run.
- They felt increased pressure to help more with child care and household chores to give their wives/husbands the flexibility to respond to crises at work when necessary.
THE CONCERNS OF CORPORATE LEADERS

What are the implications of reduced load arrangements for organizations?

On balance, respondents in this study saw more advantages than disadvantages of reduced load work arrangements, as this figure shows. The figure also shows that our respondents saw net benefits at the level of individuals, work units and the organization as a whole.

Can managers be effective when they work reduced load?

We asked both the superiors and the direct reports to evaluate the performance of the part-time managers in our sample. We reported earlier in "Stakeholder Views" that 70% of superiors evaluated the work of these managers very positively. We also received surveys from more than half of the direct reports, whose mean rating of the "overall effectiveness" of their managers was quite high – 7.2 on a scale of 1 to 9 where 1 indicated "very ineffective" and 9 indicated "very effective."

Consistent response patterns were found on 9 of the 22 individual questions, where 60% or more of the direct reports disagreed or strongly disagreed that their managers' reduced load arrangements:

- Had hampered their professional development
- Had reduced access to important information
- Had affected the amount of feedback they received from the manager
- Had made them feel less supported
- Had decreased the amount of knowledge and expertise available
- Had affected their own career prospects in the organization
- Had made their own jobs more complicated
- Had decreased clarity of goals and objectives in the department
Food for Thought

Corporate leaders and supervisors clearly are very important to the success of reduced load work arrangements. Among both managers and professionals, a “supportive boss” or senior manager was the single most important success factor, mentioned by all but 6 managers and professionals. The behavior of corporate leaders was also specifically mentioned by at least one third of the respondents:

Supportive corporate leaders...

- Publicly endorse alternative work arrangements
- Hold executives accountable for the quality of work life they provide
- “Walk the talk” by leaving work at a reasonable hour
- Empower managers to craft whatever is reasonable to accommodate employee needs
- Tell stories from their lives which illustrate their commitment to work/family balance

Supportive senior managers...

- Ensure meetings aren’t scheduled for days off
- Are eager to help, flexible, sensitive, and creative problem-solvers
- See reduced load arrangements as a way to keep valuable skills
- Are willing to “buck the system”
- Respect boundaries and help workers prioritize
- Lobby for acceptance of alternative work arrangements
- Are comfortable with ongoing re-adjustment and fine-tuning
- Give targets some control and encourage dialogue about appropriateness of load
- Assume shared responsibility for success

These data offer some lessons for corporate leaders about other organizational characteristics that affect the success of reduced load work arrangements. Respondents identified the same three factors as BOTH supporting and impeding success: Corporate Culture, External Environment, and Business Goals (examples of each are listed below). We think this illustrates that organizations choose whether to treat any given challenge as a threat or an opportunity. Some organizations in this study, for example, treated pressure to cut costs as a threat and contracted workers’ flexibility, while others treated the same pressure as an opportunity and expanded options.

<table>
<thead>
<tr>
<th>Factors Impeding Success</th>
<th>Factors Facilitating Success</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Effort equals face time</td>
<td>• Results-oriented</td>
</tr>
<tr>
<td>• Younger workers are willing to work very long hours</td>
<td>• Employees are seen as a valuable asset, worth investing in and keeping</td>
</tr>
<tr>
<td>• Part-time is seen as a step down</td>
<td>• Openness to change, encouragement of entrepreneurial thinking</td>
</tr>
<tr>
<td>• Good work is rewarded with more work</td>
<td>• Work environment supports independence, flexibility, empowerment</td>
</tr>
<tr>
<td>• Highly competitive industry</td>
<td>• Demographic changes in the labor force (e.g., more women, dual-earner families)</td>
</tr>
<tr>
<td>• Low growth economy and downsizing</td>
<td>• Tight labor market for knowledge workers</td>
</tr>
<tr>
<td>• Rapid growth in the industry generating heavy work demands</td>
<td>• Cutting costs by maximizing efficiency</td>
</tr>
<tr>
<td>• Cutting costs by minimizing head count</td>
<td>• Need for staffing flexibility</td>
</tr>
<tr>
<td>• Organization can’t afford to make up what the reduced load person can’t do</td>
<td>• Retention and recruitment goals</td>
</tr>
<tr>
<td></td>
<td>• Strategic objectives for diversity and women’s advancement</td>
</tr>
</tbody>
</table>
HUMAN RESOURCE IMPLICATIONS

The professionals and managers who participated in this study come from both large and small companies in a broad range of sectors of the North American economy. The diversity across the sample is very important because it allowed us to observe characteristics of reduced load arrangements that cut across industrial sectors. Our comprehensive observations also challenged some "conventional wisdom" about reduced load arrangements — what was thought impossible in one firm was often considered an ideal arrangement in another.

In addition to their broad industrial representation, the companies in our sample also varied widely in degree of unionization, percentage of female employees, and proportion of part-time workers.

The "average" manager or professional we studied had many years of experience with his or her employer and was a fairly high level employee. As the table to the right shows, however, there also was a broad range of experience and seniority.

<table>
<thead>
<tr>
<th></th>
<th>Range</th>
<th>Mean</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>The Employers</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Number of employees</td>
<td>170-240,000</td>
<td>48,847</td>
</tr>
<tr>
<td>% Female</td>
<td>19 - 80</td>
<td>46.4</td>
</tr>
<tr>
<td>% Unionized</td>
<td>0 - 91</td>
<td>15.6</td>
</tr>
<tr>
<td>% Part-Time</td>
<td>1 - 75</td>
<td>10.9</td>
</tr>
</tbody>
</table>

|                     |       |      |
| **The Managers and Professionals** |       |      |
| Years with employer  | .75 - 34 | 11.2 |
| Salary (US$)         | $20k - $140k | $57,199 |

**What jobs can be successfully performed on a reduced load basis?**

There was less agreement than expected about the contribution of the nature of the job itself to success. For example, some respondents stated that project work without responsibility for direct reports, or the absence of direct accountability to clients or customers, was critical, and yet there were successful cases in the sample where there were direct reports and where close communication with clients or customers was essential. Target respondents tended to assert that limits to the success of reduced load work arrangements lay not in the nature of jobs, but in the lack of imagination in re-defining or re-structuring jobs.

Professionals were most likely to work in the areas of Finance, Human Resources and Corporate Communications, or Research and Development. However, 25% were in Information Systems, Production/Operations, and Marketing. Although some of them had the title of manager and might supervise a secretaty or administrative assistant, they did not have responsibility for a group of direct reports. Some examples of job titles were:

- **Project Director**
  - Principal Research Scientist
  - Software Engineer
- **Product Development Chemist**
  - Organizational Effectiveness Manager
  - Manager, International Business Development
- **Vice President, Finance**
  - Director of Contracts
  - Vice President, Info. Systems

There were three types of managerial jobs in the sample. Respondents **Managing Professionals** had direct reports who were usually competent, seasoned professionals needing little direct supervision or coaching. These managers also had a significant chunk of independent contributor work to do. Their critical interface with others was not downward, but lateral and upward. These kinds of interfaces did not necessarily require face-to-face meetings, except for presentations, which were scheduled well in advance to meet constraints of multiple players.
**Line Managers** were in functional areas linked directly to production and operations, or delivery of product/services to customers. These managers described their jobs primarily as managing their direct reports, who were the ones actually doing the work itself. More than half and sometimes virtually all of their time was spent selecting, training, coaching, mentoring, monitoring, and assessing those they were responsible for, as well as organizing and coordinating the work itself. They were also held accountable for financial or other deliverables on a monthly or quarterly basis, and they operated under critical time deadlines on a regular basis. These managers were more likely to be working at least 80% or sharing the job, and they reported using e-mail and the phone a great deal to stay in touch with their direct reports, customers, or clients on their days off.

**Project Managers** operated more often as matrix managers than traditional hierarchical managers. The members of their project teams were all professionals and needed minimal guidance and direction. Their work involved a great deal of lateral interface across different areas, seeking consultation and gaining cooperation on the basis of their expertise and interpersonal skills rather than their rank.

<table>
<thead>
<tr>
<th>Managing Professionals in a Support Function (48%)</th>
<th>Line Management (39%)</th>
<th>Project Manager (13%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Director of Finance</td>
<td>Manager, Export Operations</td>
<td>Software Development</td>
</tr>
<tr>
<td>Vice President, Human Resources</td>
<td>Sales Manager</td>
<td>Re-engineering Corporate</td>
</tr>
<tr>
<td></td>
<td>Branch Manager</td>
<td>Financial System</td>
</tr>
</tbody>
</table>

**What characteristics of jobs made them conducive to reduced load work?**

- Clearly defined and bounded tasks with predictable peaks
- Access to technology at home, in the office, and often the car
- Short-term project oriented work requiring exceptional entrepreneurial effort
- Being at a high level in the organization, with a lot of authority
- Located in “staff” or support functions, or corporate headquarters
- Managing people more than tasks, leading and delegating
- Having clear financial indicators of success, a focus on results
- Client/customer interface usually handled via telephone or e-mail
- Having discrete tasks which can be re-allocated, re-configured
- Work unit operates with a strong teamwork mentality & minimal reliance on manager

**What characteristics of jobs made it difficult to work a reduced load?**

- Excessive, expanding, or hard to control work demands
- Having to deal regularly with ad hoc emergency requests/crises

**What aspects of managerial jobs made them difficult to work on a reduced load?**

- Having to supervise new or marginally qualified direct reports
- Expanding staff
- Located close to getting product or service out the door
Negotiations and Logistics

Why did managers and professionals ask for reduced load work?

Managers and professionals without children typically requested reduced load work in order to have time to pursue hobbies, religious activities, or community service; or in response to concerns about their health. Managers and professionals who were parents reported that they pursued reduced load work in large part because of their children. About one third of the parents reported that having children had changed their life priorities, making them less willing to structure their whole lives around their jobs. Most expressed deep and continuing commitment to their careers, but also a sense that their work at home was at least as important and possibly even more fulfilling.

How was reduced load work pursued?

About 15% of the respondents changed employers, usually because they had been unable to arrange a part-time position with their previous employer. About 13% of the sample continued to fulfill the same responsibilities on a part-time basis. The remaining managers and professionals either moved into a new or pre-existing part-time job or a formal reconfiguration of their current job. By far the most common strategy for pursuing a reduced load arrangement was to approach the senior manager, either informally or with a formal written proposal. In about 15% of the cases, the senior manager initiated the idea in an effort to keep a valuable worker they thought would otherwise leave. Respondents who did not start with their senior managers usually found positions via a corporate intranet or their own personal or professional networks.

How were workloads reduced?

For all the managers and about 2/3 of the professionals who reduced their responsibilities, the amount of work was reduced by cutting the number of clients or projects, by extending deadlines, or by trimming less important components of the job. The remaining professionals had reduced their level of responsibility, usually moving away from managing people or interfacing with clients in favor of more project-oriented work. Overall, respondents had reduced their work time by about 18 hours per week. Professionals had been able to reduce about 2 hours more than managers.

How were the arrangements structured?

The chart below describes the arrangements we studied in terms of pay, benefits, and vacation. The first row shows that most respondents received wages prorated by the percent of a full-time load they were working, although there was considerable diversity even within this category. The second row shows that professionals were more likely to receive partial benefits (i.e., a smaller selection) than managers, who were more likely to receive full or prorated (i.e., smaller employer contribution) benefits. Managers were also more likely than professionals to retain full vacation.

<table>
<thead>
<tr>
<th>Access to Wages, Benefits and Vacation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Wages</td>
</tr>
<tr>
<td><strong>Full</strong></td>
</tr>
<tr>
<td>3% professionals</td>
</tr>
<tr>
<td>No managers</td>
</tr>
<tr>
<td>Includes 1 professional whose</td>
</tr>
<tr>
<td>reduced hours are treated as leave</td>
</tr>
<tr>
<td><strong>Prorated</strong></td>
</tr>
<tr>
<td>61% professionals</td>
</tr>
<tr>
<td>100% managers</td>
</tr>
<tr>
<td>16 receive pay or comp</td>
</tr>
<tr>
<td>time for overtime</td>
</tr>
<tr>
<td><strong>Partial</strong></td>
</tr>
<tr>
<td>No professionals</td>
</tr>
<tr>
<td>No managers</td>
</tr>
<tr>
<td><strong>Other</strong></td>
</tr>
<tr>
<td>18% professionals</td>
</tr>
<tr>
<td>No managers</td>
</tr>
<tr>
<td>Paid by the hour</td>
</tr>
<tr>
<td>Benefits</td>
</tr>
<tr>
<td><strong>Full</strong></td>
</tr>
<tr>
<td>50% professionals</td>
</tr>
<tr>
<td>43% managers</td>
</tr>
<tr>
<td>Includes pensions based on</td>
</tr>
<tr>
<td>prorated wages</td>
</tr>
<tr>
<td><strong>Prorated</strong></td>
</tr>
<tr>
<td>18% professionals</td>
</tr>
<tr>
<td>30% managers</td>
</tr>
<tr>
<td>16 receive pay or comp</td>
</tr>
<tr>
<td>time for overtime</td>
</tr>
<tr>
<td><strong>Partial</strong></td>
</tr>
<tr>
<td>32% professionals</td>
</tr>
<tr>
<td>No managers</td>
</tr>
<tr>
<td><strong>Other</strong></td>
</tr>
<tr>
<td>No professionals</td>
</tr>
<tr>
<td>No managers</td>
</tr>
<tr>
<td>These managers had no benefits</td>
</tr>
<tr>
<td>Vacation</td>
</tr>
<tr>
<td><strong>Full</strong></td>
</tr>
<tr>
<td>9% professionals</td>
</tr>
<tr>
<td>41% managers</td>
</tr>
<tr>
<td><strong>Prorated</strong></td>
</tr>
<tr>
<td>65% professionals</td>
</tr>
<tr>
<td>55% managers</td>
</tr>
<tr>
<td><strong>Partial</strong></td>
</tr>
<tr>
<td>No professionals</td>
</tr>
<tr>
<td>No managers</td>
</tr>
<tr>
<td><strong>Other</strong></td>
</tr>
<tr>
<td>No professionals</td>
</tr>
<tr>
<td>No managers</td>
</tr>
<tr>
<td>No managers</td>
</tr>
</tbody>
</table>
Policies and Practices

About 30% and 50% of the firms where we interviewed managers and professionals, respectively, had formal policies about reduced load work. Policies varied widely in their breadth and detail, from simple rules about access to benefits to more elaborate recommendations for procedures to be followed in establishing and monitoring reduced load work arrangements. Some practices that were not always part of formal policies or programs, but that were mentioned as helpful or supportive included:

- Overhead costs allocated to limit impact on immediate work unit
- Seasonal shifts in work load
- Specification of how many hours "overtime" are normally expected e.g., 10% of official hours worked
- Temporary shifts to full-time when promoted, for a transition period before re-configuring new job
- Accounting based on FTE not head count
- Affordable benefits coverage for reduced load workers
- Trial periods
- Eligibility for bonuses
- Compensatory time or pay provided when target works extra hours in response to unusual circumstances

Some respondents said that the presence of policies was "affirming" and made reduced load work "feasible." Respondents found a variety of policies helpful, some of which did not explicitly include reduced load work, such as affirmative action, diversity, or work/life policies. However, respondents also reported some concerns about formal policies:

- The burden is on employees to structure negotiations
- Discretion is always given to local senior manager to approve or not, which means that the overall organizational culture or climate plays a bigger role than formal policy
- Ambiguities in policies around time frame of reduced load work, and rights of employees to phase back to full-time or not, are potentially helpful and harmful
- New policies threaten pre-existing arrangements
- The criteria and administrative rules are too narrow – limits flexibility
- Can't locate reduced load jobs in the company
- HR information system and/or head count rules can't handle reduced load workers
- Labels used to identify types of reduced load work can stigmatize and hurt career
- If reduced load work becomes an entitlement and much more common, managing and coordinating schedules and meetings could become a headache

Human Resources staff members often were mentioned as helpful in the establishment and management of reduced load work arrangements. Specific types of assistance mentioned as helpful included:

- Producing guides and manuals
- Posting information on corporate intranet
- Publicizing successful cases through newsletters, etc.
- Answering questions and responding to concerns
- Assisting with job analysis
- Help in preparing proposals
- Identification of specific jobs which can be done on less than full-time

Page 14
The results of this study tell a success story that frankly surprised us in its consistency. On this page we summarize indicators of success that respondents identified.

- Managers and professionals gained an average of 18 hours per week by working reduced load
- Direct reports’ ratings of their reduced load managers’ effectiveness averaged 7.2 out of 9
- 35% of the managers and professionals had been promoted while on reduced load
- An average of 4.4 years on reduced load; only 10% planning to return within 3 years
- 90% report positive effects on their children – better relationships and more time with them
- 91% happier and more satisfied with the balance between home and work

What was the major concern? The potential career costs of working reduced load were mentioned as a concern by many respondents in the study. Although most (but not all) believed they had made some tradeoffs, about 2/3 of the managers and professionals did not believe their career progress had been stopped. Many also talked about wanting to pursue career success on their own terms, because of the importance of family and other priorities in their lives. They expressed quite adamantly and eloquently that they didn’t believe that working reduced load would prevent them from continuing to advance and develop professionally. The senior managers of the managers tended to also assert that the targets could continue to progress, at least up to a certain level. The co-workers, spouses, and HR representatives had a more pessimistic view.

The net result. In addition to the ratings of overall success described at the beginning of this report, interviewers rated separately the costs and benefits to the individual, the family, and the organization for each case. As the chart below shows, average benefits were at least twice as high as average costs in every domain. While the greatest costs were incurred in the personal/career domain, on average, benefits were virtually equal in every domain.
IMPROVISING NEW CAREERS: ORGANIZATIONAL PARADIGMS

Our analyses revealed three different organizational stances toward alternative work arrangements. The dimensions that distinguish these paradigms are shown at the left side of the table below.

<table>
<thead>
<tr>
<th>Negotiations</th>
<th>Accommodation</th>
<th>Elaboration</th>
<th>Transformation</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Guided by the individual situation – firm is reluctant</td>
<td>Guided by policy and culture</td>
<td>Guided by individual situation and culture</td>
</tr>
<tr>
<td>Responsibility</td>
<td>Onus is on the individual</td>
<td>Policies and programs, plus the individual</td>
<td>Shared by individual and senior manager</td>
</tr>
<tr>
<td>Employer Rationale</td>
<td>• Financial benefits</td>
<td>• Retention</td>
<td>• Business needs</td>
</tr>
<tr>
<td></td>
<td>• Increased productivity</td>
<td>• Helps meet diversity goals</td>
<td>• Organizational adaptation</td>
</tr>
<tr>
<td></td>
<td>• Retain valued Individual</td>
<td>• Getting on the work/life bandwagon</td>
<td>• Recruitment and retention</td>
</tr>
<tr>
<td>Employer Posture</td>
<td>Acquiesce and contain</td>
<td>Institutionalize and manage</td>
<td>Experiment and learn</td>
</tr>
<tr>
<td>Career Impact</td>
<td>Marginalized, pressure to return to full-time</td>
<td>Temporarily on hold, but firm continues to invest in professional development</td>
<td>Career is moving, promotion is possible while on reduced load</td>
</tr>
</tbody>
</table>

Each paradigm carries advantages and disadvantages. Within the Accommodation paradigm, alternative work arrangements are the exception rather than the rule, with the likely result that only very high performers will seek them. Little is required of the firm since the responsibility for success rests entirely with the individual. This paradigm may serve the interests of individuals well so long as they are willing to live with the potential of greater career tradeoffs. However, this paradigm does not portend change in models of professional and managerial career structures, unless one views these exceptional cases as tentative explorations which organizations could learn from in the future.

Reduced load work in the Elaboration paradigm exists in a context of well-articulated, and usually, well-communicated, work-life policies. This makes it less risky for individuals to ask, at least in theory, and there is less dependence on the good will of individual bosses. A disadvantage, however, is that formal policies may institutionalize alternative work arrangements in ways that interfere with their success; career outcomes also are unclear. In spite of the innovation and experimentation in the Elaboration paradigm, there appears to be no real re-evaluation of the traditional career path to the top, which remains accessible only to those working full-time.

Transformation cases were found in firms that tended to have formal work-life policies and programs, but they were less detailed or were unevenly administered. The design of the reduced load work was viewed from the perspective of the strategic direction of the firm. Negotiation depended upon a supportive boss, but there was also widespread commitment to supportiveness as a part of the organizational culture. Uneven implementation of policies was a disadvantage of this paradigm. The Transformation paradigm suggests that reduced load work arrangements were seen as pre-cursors to an era of much more common customized work arrangements.

Opportunities for Organizational Learning

Reduced load work can be examined as one kind of flexibility in a larger package of work/life benefits. And from this point of view there are important lessons to be learned from this study. But reduced load work can also be viewed as an attempt to re-define "full-time," at least at the professional/managerial level. Negotiating a less-than-full-time status legitimizes setting limits on just how many hours a week one will work. Another perspective is to view these arrangements as examples of experimentation, improvisation, and exploration, in response to changing demands from the work force, customers, and clients. Our respondents identified a number of benefits of reduced load from an organizational learning perspective. For example:
• Reduced load work challenges traditional managerial assumptions and opens doors
• Reduced load work de-couples "face time" and effectiveness
• Reduced load work pushes in direction of greater cross-skilling in teams
• Those on reduced load serve as role models for innovative ways of doing things
• Managers on reduced load must have superb communication systems, which generates creative new ways of working with others
• Men choosing reduced load reinforce the need for pluralism in management career paths
• Successful reduced load arrangements breed more alternative work arrangements, which stretch senior managers' capacity for effective individual negotiations
• Reduced load work pushes firms to find career opportunities further and further up the hierarchy for the "high fliers," thus requiring soul-searching and re-imagining of traditional assignments, as well as mechanisms for assessing performance and career potential

Recommendations

Organizations that want to successfully implement reduced load work arrangements should carefully consider the possible relevance of the barriers to success identified by respondents in this study. We have already mentioned specific job characteristics (p. 12) and cultural norms (p. 10) that were reported as stumbling blocks to success. Five other significant barriers were noted:

• Widespread views that managerial jobs, or jobs requiring a high level of responsiveness to clients or customers, cannot be successfully performed on a reduced load basis
• Senior managers' uncertainty about how to allocate and fairly evaluate reduced load work
• Inadequate, inconsistent, or non-existent policies and programs make it more difficult for individuals to negotiate alternative work arrangements
• Failure of mainstream human resource policies and practices to incorporate and "normalize" different ways of working
• Individuals erring on the side of over-work to protect the viability of reduced load arrangements

Organizations aiming to maximize the success of reduced load work arrangements may want to consider the following strategies observed in this study:

• Trial periods can be used more widely and effectively to help reduced load workers and their senior managers increase the chances of success of reduced load work
• Senior managers and reduced load workers should expect to monitor and occasionally recalibrate work loads, time arrangements, and performance appraisal processes
• Coworkers' concerns should be identified, acknowledged, and managed
• Senior managers should assume some responsibility for the success of reduced load work arrangements, managing schedules and monitoring equity in compensation and time worked
• Organizations should continue efforts to index performance by output rather than face time

The wide variety of successful arrangements in this study suggests that organizations may currently be more hesitant than necessary about reduced load work arrangements. Most organizations already deal successfully with workers who are away from the office a significant proportion of the time for business travel and field work with clients and customers, or who are telecommuting. Organizations which seek to be adaptable perhaps will also be prepared to do the same around reconstructing work and career structures to meet the flexibility needs of a changing work force.
METHODOLOGICAL NOTES

Data for this study were gathered between 8/96 and 3/98 by a team of 7 researchers — 6 academics from 2 universities in Canada and 2 in the U.S., and an independent Ph.D. consultant based in Connecticut. About 2/3 of the cases were U.S.-based and 1/3 were based in Canada. Interviews were conducted in 45 companies. Usually, one interviewer gathered all data for a particular case.

To ensure methodological rigor, this study relied upon multiple sources of information and multiple types of data. Separate face-to-face interviews were conducted with the target manager or professional and his or her spouse or partner, senior manager, a peer co-worker, and a human resources representative. Interviews with the target respondent and spouse lasted about 1.5 hours; other interviews lasted about 45 minutes. Interviews were audio-recorded and transcribed verbatim; over 400 were conducted. Interviews were semi-structured and included the following topics:

- the structure of and reasons for the reduced load work arrangement
- how the job was restructured to accommodate the reduced load schedule
- perceptions of the challenges and difficulties involved in restructuring the job
- costs and benefits of reduced load work arrangements from multiple perspectives
- factors important in making reduced load work arrangements successful or unsuccessful

In addition, persons who reported to each manager were asked to complete a brief quantitative survey. Of the 253 direct reports of the 46 managers in the study, 218 were sent questionnaires to complete anonymously and return directly to the researchers in a pre-stamped, self-addressed envelope. Overall, 72% (n=153) of the questionnaires were returned, and in 22 cases this included 100% of the direct reports. In this brief survey respondents indicated their:

- Assessment of their manager’s overall effectiveness
- Level of agreement with statements about the effects of the reduced load work arrangement

Except for the direct report survey, data analyses were primarily qualitative. Rather than quantifying respondents’ answers, qualitative methods analyze the actual content — what people say and how they say it. Most analyses used one of two techniques: a modified form of “axial coding,” where interviewers extracted all the material applying to the key themes listed above; and “grounded theory,” where new themes are identified while reading transcripts.

Qualitative methods are very useful for understanding a phenomenon from multiple vantage points, and for refining research questions and hypotheses for subsequent studies; they are not typically used as the basis for generalizing findings to much larger populations. Readers must be cautious in their interpretation, remembering that the sample was unique in a number of ways. For example, the part-time jobs studied were unusually high-level and well-compensated (including benefits). The employers were quite large and thus not representative of the North American economy, and at most, only a handful of work arrangements was studied in any one organization. It was not possible to randomly select respondents, and those we were given access to were likely above average in success. Finally, in each case we spoke to only one coworker, who was generally nominated for the interview with us by the target manager or professional. These necessities may have resulted in a sample more supportive of reduced load work than we might otherwise have obtained.

Several methodological features of this study support the accuracy of the findings reported here, however. Reliance on multiple data sources increased the likelihood of learning about less-than-positive perspectives. Most senior managers were not the ones who created the arrangements and thus had little incentive to positively distort their views. Direct reports were able to respond anonymously. Analyses were conducted separately for managers and professionals, which provided opportunities to check the reliability of findings. Finally, the sample was extremely large and diverse.
We are grateful for participation and/or assistance from the following individuals and organizations:

The Alliance of Work/Life Professionals
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Boston College Center for Work and Family
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Business and Professional Women
Catalyst
Steve Cohen
The Conference Board of Canada
Corporate Family Solutions (now Bright Horizons Family Solutions)
Kerry Daly
The Families and Work Institute
Kathy Kram
Susan Lambert
The Minnesota Center for Corporate Social Responsibility
New Ways to Work
One Small Step
Sue Shellenbarger
The Wharton-Merck Teaching Roundtable
The Work/Family Roundtable
Work + Family Connection
Working Mother Magazine

- Some of the findings reported here were presented at the following national conferences:
  The Academy of Management, San Diego, California
  Work and Family: Today's Realities and Tomorrow's Visions, Boston, Massachusetts
  The American Academy for the Advancement of Science, Anaheim, California

- Additional copies of this report may be ordered by contacting Shelley MacDermid at shelley@purdue.edu. This report may be duplicated for nonprofit and educational purposes.

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