
Strategies for living: moving from the balance paradigm

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Abstract

This paper presents a new paradigm for conceptualizing the relationship between individual, family, and work. The language and focus of the balance approach is limiting and keeps individuals from creating integrated lives. Based on previous research and the authors' experiences in facilitating organizational transformation, a new view of the issue of work-life balance is described. This approach focuses on the engagement of each individual in an organization as a whole person. Within the organization, efforts to help individuals consciously create a life's purpose and meld this purpose with their organizational contribution avoid sub-optimization and create the opportunity for synergistic performance.

Introduction

The recognition that there is a relationship between the well being of employees and their contribution in the work place is not a new or revolutionary concept. In a recent survey of over 6,000 workplaces in Canada, three-quarters of the respondents indicated that human resource management was an important aspect of their business strategies associated with product development and cost reduction (*Worklife*, 2001). This being the case, it is not surprising that much has been written about human resource policies and their relationship to organizational performance. Previous research has worked to establish the importance of a wide range of variables associated with the overall well-being of employees and with the level of employee contribution to the organization (Berg *et al.*, 2003; Batt and Valcour, 2003). Employee productivity, stress, absenteeism, company loyalty, product quality, and job satisfaction are examples of measures of employee well being cited in previous research (IR Research Publications, 2000). In particular, there is evidence that employers can benefit from work/family and/or work/life policies (Rose, 1996). Many work/family and/or work/life human resource programs are focused on improving the nature of the work environment to be more supportive of employees and to provide better quality jobs where all employees are encouraged to bring their full capabilities to the tasks at hand (Hall and Parker, 1993). These efforts have been linked with higher job satisfaction, increased employee loyalty to the organization, and increased levels of employee commitment to the success of the organization as measured by employee commitment, retention, and productivity

(Gover and Crooker, 1995; Joesch, 1997; Bond *et al.*, 1998).

Today's human resource and line managers have come to understand that there is a relationship between the well being of the employee and business results. This realization has intensified the development of corporate policies and programs focused on work/life issues and in many cases more narrowly focused on work/family issues. Organizational efforts towards this end are largely focused on providing benefits, creating programs and/or establishing policies that attempt to create a supportive workplace for employees facing specific work/life issues (Drago *et al.*, 2001). Human resource strategies associated with work/life programs are varied but often include familycare programs, employee-friendly benefits, flexible work arrangements, financial and wellness counseling, and personal convenience services. These types of programs have been credited with helping organizations achieve outstanding business results (Flynn, 1997). In *Workforce's* expanded October 1997 survey, however, a surprising 67 per cent of survey respondents indicated that they did not measure the effectiveness of work/life initiatives that had been implemented within their organizations. So while much passion and fervor exists over how to best assist employees in balancing their work and personal lives, many organizations fail to evaluate the true impact of these programs.

One of the difficulties of assessing the impact of work/life programs is the diversity of work/life benefits, policies, and programs. In the workplace flexibility literature, Blyton (1991) identified four types of flexible work practices – task flexibility, numerical flexibility, temporal flexibility, and wage flexibility. Task flexibility is provided through programs such as job rotation or

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multi-skilling. Numerical flexibility is provided by policies which utilize external labor, subcontracting, or fixed-term contracts as mechanisms to change the size or structure of the workforce. Temporal flexibility is provided by policies or programs which provide employees with a variety of work patterns such as part-time work, telecommuting, or variable shifts. Finally, wage flexibility incorporates pay strategies which individualize pay based on performance factors rather than fixed, uniform pay systems. While this conceptualization does not identify a specific strategy for creating a flexible work environment, it does provide a framework for assessing the diversity of flexibility practices adopted within an organization. One might postulate that a comprehensive work/life human resource strategy should incorporate flexible work practices from all four areas. In the corporate literature, companies that are recognized for their progressive work environments often provide a collection of programs such as elder care and child care assistance benefits, employee assistance programs, and/or flexible work hour policies (Galinsky and Bond, 1998). This collection of practices does provide flexibility across the areas identified by Blyton and might be interpreted as providing support for a human resource strategy which incorporates a diversity of practices.

A second framework from the literature sheds more light on the challenge faced by managers in evaluating the effectiveness of work/life programs. Friedman and Galinsky (1992) have suggested that organizations evolve through three stages in developing benefits, policies, and programs related to work/family concerns. This evolution could be similarly applied to a broader range of human resource initiatives focused on work/life challenges. In the first phase, organizations will implement programs targeted at addressing the needs of specific groups of employees, e.g. women with children. In the second phase, programs impacting a greater number of employees will be developed and organizational policies will evolve to address the broader issues of work/life balance. In the third phase, the integration of programs moves from formal programs to transformation of the norms and culture of the organization. If the integration of flexible work practices does occur, defining metrics to capture the impact of such practices becomes dependent on where the organization is at in this evolution.

The diversity of flexible work practices and the difficulty of assessing the impact and the

usability of a work practice create a challenge for human resource managers (Drago and Hyatt, 2003). This challenge, however, is magnified in part by the issue which flexible work practices are designed to address – the challenge of balancing the demands of work and family life. Flexible work practices are almost always referred to as mechanisms by which employers are trying to help employees manage the competing demands of their work and the rest of their lives. By promoting a concept of balance between work and life (often framed as work and family), both managers and employees are constantly in search of the right set of benefits, policies, and programs. In this paper, we propose a new way of thinking about managing the various aspects of the lives of working professionals. This perspective is not offered to criticize existing flexible work practices, but rather to challenge the current paradigm that focuses on finding balance between work commitments and those commitments outside of work. As a starting point, two metaphors are described to provide contrasting images of the challenge facing working professionals today. The first is a metaphor of balance, and the second is a metaphor of soaring.

Metaphor 1: life as a balancing act

Imagine several balance beams atop a pyramid shaped pedestal. Each beam is balanced, but each beam also lays in a different direction – forming a star with multiple points. The individual stands at the center of this star in a balanced position. At the end of each beam is a subject of grave importance to the individual. The subjects (family, career, health, aging parents, financial opportunities, spiritual growth, etc.) call out and beg the individual to move off dead center, to devote just a little more attention their way. Tempted, the individual may take a step out on one of the beams, addressing a particular life subject. Just as one foot extends the precarious balance is upset, and the whole system of priorities seems to go haywire. Balance is lost and much effort must go into restoring stability.

On a day-to-day basis, individuals often feel that their lives are out of balance. Pushing toward accomplishment in one area in life and addressing one subject often results in a guilt-plagued mindset and with concern for other neglected areas. More importantly, however, even when life's pieces are balanced, the feeling is often unsatisfying. The emotional drain of keeping everything in

balance is often overwhelming. As a metaphor, balance is neither powerful nor empowering, and we contend that the image of balancing, itself, contributes to the problem. Balancing does not embrace the integration of life, but rather depicts life as a set of competing priorities. Each important element in our life seeks our attention, with several losing out.

Metaphor 2: soaring in life

A different metaphor may offer the opportunity to see the forces of life in another way. Instead of an image focused on the act of balancing, think of soaring . . . possibly with the use of a parasail or paraglide. The image of parasailing is a bit more frightening in that individuals are not rooted to a foundation (albeit an unsteady foundation such as a balance beam). Going aloft requires a leap of faith. Once airborne, the parasailor must look for updrafts to keep aloft. The force of the updrafts represents life's purpose or the reason for being. As individuals better understand and seek out their purpose in life, the energy found in the updraft takes them higher. No longer is it a fight between priorities, but rather finding in all of life's experiences (the sky as a whole), the life enhancing and purpose-fulfilling places to travel to.

In the soaring paradigm, life and all its pieces are integrated in a journey – they are not distinct steps out in a specific direction. In other words, in the soaring metaphor, it is not necessary to show up at different venues with different objectives or behavior. Rather, individuals show up to life with a clear purpose; their energy driving them toward fulfilling that purpose. This does not mean that goals and measurable accomplishments are foregone, rather, life's purpose becomes central, and changing priorities simply provide new sources of energy to drive an individual to discover how the many aspects of life are connected. The balancing act is replaced with a fuller expression of being through engagement in life in its many different forms. Additionally, synergy is discovered because of the integrated nature of being whole and showing up whole. Instead of pitting one objective against another, new options are revealed and sub optimization is averted.

The limits of balance

Organizational leaders and organizational processes are critical in helping employees move from the balance mindset. The

organization's call is to help employees "get a life". Get a life. This phrase, often directed at individuals who are too focused on the minutiae of the immediate rather than the more important aspects of life, embodies the essence of the message calling for fully integrating all life. In other words, individuals must first get clear as to why they have a life and then the various elements of their lives will be governed by that purpose. This can only be accomplished by moving away from the approach associated with achieving balance. The concept of balance forces individuals to think about designing a system of competing forces: those things they must do and those things they should do. This approach creates a win-lose situation; in other words, by choosing one area of focus or attention, other areas are shorted.

For working professionals with families in tow the best-case scenario with a balancing mindset is to minimize the guilt in coming up short on either the work or the family side of the equation. Guilt becomes the lifelong price of the balance approach. Balancing becomes an optimization problem in time and scheduling. Guilt-ridden excuses are used to justify the choices made between work and family. This creates a cycle of asking forgiveness for the sub-optimal trade-offs made. In other words, because one side of the equation is always on the debit end, there is a feeling that the family, employer, or significant other have been shorted or disappointed in the effort to find balance between the competing components of life.

There is evidence that this guilt manifests itself in a real and measurable way in the work environment. A recent survey performed by CCH Incorporated (2001) found that only 32 per cent of employees who called in sick in the past year were actually ill. The employees of the companies surveyed were found staying home because of stress, family issues or personal needs, or because they had reached the point in their lives that they simply felt they were entitled to a day off. The cost: \$755 a year per employee. This represents a failure at work.

Similarly, this guilt also finds its way into our personal lives in a measurable way. In a 1999 study conducted by Ellen Galinsky, president of the Families and Work Institute, more than 1,000 children were asked questions about their working parents. What the children wanted was parents who were less stressed and less tired from their work. Almost 35 per cent of the children interviewed wished this for their mothers and 27.5 per cent for their fathers. This finding may also help to explain why,

without regard to the household's current income level, 23 per cent of the children wished their parents earned more money. Lack of money was seen as the primary reason that parents worked so hard and were stressed. Therefore, the perception of the children surveyed is that more money would produce a reduction in stress, fatigue and anxiety. In addition, 10 per cent of the children wished their mother would spend more time with them, and 15.5 per cent of the children wished their father would spend more time with them. Overall, more than 30 per cent of children surveyed worry "often" or "very often" about their parents. This represents a failure with family.

Last, this guilt also shows up in the individual employee. Americans, for example, are now averaging in excess of 2,000 hours per year, representing nearly two weeks more than the nearest competitor, Japan. The emphasis on work leads to more stress. Stress reduction, the medical field's prevention mantra of these last few decades, is virtually untouched by the current set of human resource policies aimed at improving the balance between work and family. This represents a failure with individual.

The search for balance

Optimizing the work of an organization is a topic that has been approached as a single variable equation in the past. Labor has been considered a variable described in terms of units of labor hours and direct and indirect labor costs. To optimize work, organizations began to focus on productivity improvement efforts directed at people in the workplace, not at people in their lives. This was not a holistic approach. The outcome of this myopic line of thinking has produced some modern day dilemmas. For example, attempts to increase control and monitoring of employee performance have gone side by side with programs aimed at increasing employee self-actualization. The conflict between these objectives seems to have gone largely undetected, in part because they resulted from different human resource management practices with differing objectives.

The founder of scientific management, Fredrick Winslow Taylor (1856-1915), mastered the dissection of work into specific tasks perfected in mass production industries such as the manufacture of automobiles. Methods to achieve productivity improvements were part of the many changes accompanying the growth of businesses as large organizations steadily

replaced craft industry and shops throughout the industrial revolution. The doctrine of separating work into segments and applying defined skills and allotting time to accomplish the tasks was brilliant as well as straightforward. This same approach continues to be used today across all types of organizations. For example, FedEx employees carry an electronic tasking device and managed health care systems prescribe a standard course of treatment for differing ailments. The circumstances of the past in which scientific method grew have changed. In the past, job requirements were very different. Laborers were largely required to only give muscles, arms, legs and backs to do the work. This is not the reality of the workplace today.

As businesses began to re-discover that employees brought minds to work as well as their bodies, organizations began to tap into this human resource with an unparalleled zeal that only the US business model could produce. In the 1970s international competition grew rapidly by making use of the employee's problem-solving skills. Using the minds of the workforce was no longer optional. Total quality management became a new way of working and the need for the mind of all employees was one of the accompanying shifts in the managing of human resources.

More recently, world-class organizations have begun to talk and learn about the power of the spirit at work, too. Shortening product development cycles and increased product complexity, for example, have created a need to fully employ the minds and creativity of the entire workforce. In some business sectors this is a requirement to remain in the running from a competitive standpoint. This new requirement mandated that organizations be even more interested in the person that showed up at work. Fostering creativity without engaging the spirit is a difficult task, at best. So, organizations have responded by holding spiritual rallies of a sort at work – not so different from Sunday night revivals. With fanfare, gigantic video screens, and inspirational speeches from organizational leaders, these rallies attempted to recharge the batteries of employees, at least for a time. When energy and enthusiasm began to wane, another pep talk or innovative payroll-check insert was offered to boost the spirits. These activities showed, to some extent, the organization's commitment to the whole labor unit, albeit only on a short-term basis, with the next Sunday night revival to engage the spirit of the individual again.

However, having focussed on the whole labor unit without the necessary regard for the whole person, high performance organizations have been created, but often at the expense of low performing families. Here is where the balancing mindset plays out. The choice has become work or family in terms of time, physical strength, mental capacity and spiritual energies. Work often wins. Employees have given this mega-system, the organization, the bulk of their attention and consciousness. Time, talent and treasure go to work, while a high dose of rhetoric is given to the family. Sacrifice is required to succeed in the balancing mindset. The effects can be seen by looking at the lives of both the youth in our high tech world and the personal lives of middle and senior managers. Business indicators such as employee turnover, unplanned absenteeism, company loyalty, and health benefit costs indicate that the organizational record is mediocre at best. On the family side, divorce, latch key kids, the breakdown of the extended family, and stress indicate that the family results record may not be much better. While these results can be attributed to larger societal and cultural effects, the onus for delivering higher performing families and work lives must be carried by both individuals and the working organizations they are part of.

As this dramatic shift from physical labor to employing the whole mind occurred, the approach to addressing the workforce went through little change. The pieces of the model changed, with new and improved HR plans, but the model itself did not undergo any dramatic change. From creative shift work schedules to liberalization of funeral leave policy, there has been an attempt to take into account today's family composition. In this approach each new breakdown of the work system, made visible through various labor issues, was handled by the creation of yet another new program or in many cases by the revision of existing programs.

Even within the area of self-improvement, solutions have been created that emphasize a compartmentalization point of view. For example, the healing of the individual is often addressed by separating self-improvement from other life activities and processes. Dorthery (1995) addressed this dysfunctional approach in modern psychotherapy. There has been a trend to eliminate family concerns and obligations from a moral perspective. In other words, the focus is to separate out the different parts of life and to counsel only the inner self. This approach can be seen in the "how do you feel about this" mentality that has grown in the

realm of self-improvement. Dorthery (1995) calls us to stop this foolishness and be responsible for our whole life's creation, addressing moral obligations in psychotherapy. This point is not made to criticize the practices of psychotherapy, but to illustrate the lack of integration of the whole person in yet another domain.

The extent to which lives are seen as separate and distinct pieces can be illustrated in another way. In a survey conducted by Opinion Research International for Kimberly-Clark (1999), office employees were asked to indicate what they would most like to see more of in the office of the future. The findings indicated that office employees were searching for a higher level of integration between their work and family. For example, 27 per cent of the employees wanted to see on-site day care, 18 per cent wanted to have virtual offices, 10 per cent sought an on-site fitness center and the ability to control office temperature, 8 per cent sought concierge or on-site services, and 6 per cent sought on-site medical care. These data share a common theme – they have little to do with work activities and a lot to do with lives outside of working hours. People are looking to combine work with living, to have work become part of living. In a recent review of a number of surveys from a multi-billion dollar company where stress was nearing epidemic proportions, one particular written comment brought to bear another way of viewing what is happening to today's employees. The comment was, "Work is not life". If work is not life then what is it – time out from life? Has the separation viewpoint been emphasized so much that some people are no longer simply living two lives, one home life and one work life, but have progressed to the point of living a home life and a non-life? While not all employees may subscribe to this viewpoint, the implications are disturbing at best.

Soaring beyond balance

In resolving the current problem set, organizations and their employees must look for innovative solutions to move forward in the development of the work place and of society. Instead of looking for this yet to be discovered solution, the problem definition itself needs to be challenged. Work versus family has been defined as the problem to be solved. This, the definition of the problem, is itself the issue. Instead of solving the work versus family problem, what if the whole person was considered first and foremost in all endeavors associated with human

resource management? This would require a different set of actions from those taken today.

Redefining the problem requires a shift in the model and the perspective from which leaders view their own lives and the lives of their employees. Such a shift will impact the entire range of human resource management programs, and will be a challenging shift. Wilber (1996) speaks from this position when he refers to transcending the problems of today with broader perspectives and creations of tomorrow. The broader perspective needed in the attempt to find a solution to the work versus family issues is that work and family flow from the same source, a personal life and a personal life with a purpose. When an individually tailored purpose is brought to consciousness, the balance equation no longer constrains the actions of the individual. Life pieces flow from this purpose and exist in harmony, not conflicting and competing for time. In other words, both work and family flow from, towards, and throughout the lives of individuals in keeping with their own life's purpose.

Finding a purpose in life is the required first step. Asking the question, "What is my life's purpose?" can be humbling and calls for courage. Often, the answers to this question are not rapidly forthcoming. However, the investment in the search will begin to yield partial answers. Refinements over time will begin to paint a clearer picture resulting in an understanding of purpose that becomes actionable. In other words, as individuals are able to refine, through life's experiences, what is core to them, life enables learning – rather than a sense of guilt or loss. It becomes possible to admit that a particular direction or decision did not have the desired result, and that a mid-course correction is needed. Just as the parasailor must adjust as winds shift, increase, or die down, the individual will see that changes, both internal and external, force adjustments to be made in the height and direction of travel. Each of these changes becomes an opportunity for reaffirming the connection between life's pieces, and the synergies between different aspects of life spring forward.

Declaring life's purpose to peers and family is the second essential step towards being able to integrate all aspects of the complicated lives of today's professional. Through declaration of one's life purpose, an individual is able to enlist family members and peers as supporters for the journey. The individual and perhaps only a few significant others may know the reasons and details for

why a particular purpose is energizing. However, the explicit expression of one's life direction eliminates, in part, the need for justifying decisions and choices made, and it also enables others to become advocates for the individual.

While seeking and articulating the life purpose at the individual level is a difficult undertaking, the question for organizational leaders and managers is even more challenging. How does an organization address the search for an individual life's purpose at work? It must be initiated with a different conversation; beginning at the leadership level. First a leader must openly share his/her life's purpose and how that purpose determines the organizational direction being pursued by the leader. Then, instead of filling in the blanks and defining the organizational purpose for employees, leaders must take on the role of coach, helping others discover their unique purpose. Alignment of these life energies is then accomplished.

The authors have been involved in working with leaders in a variety of organizations towards this end. Methodologies are currently being used in large organizations that follow this simple but involved course of collective consciousness toward a shared vision. In focused workshops lasting three to five days, the key concept of life purpose providing the required "lift" is brought to the forefront using experiential learning exercises and descriptive models. Increased awareness of life's purpose is produced. Individuals move toward a more conscious state of their life's calling as they are asked to respond both in word and pen to penetrating questions about them ... as individuals centering on why they are here on earth. These understandings of individual life purposes are shared while the process of strategic planning is concurrently underway. Linkage to the units and organizational mission/visions/values/goals with individual life plans is sought. Alertness to strong alignment replaces unconsciousness, ownership replaces compliance. The outcome is strategic direction infused with life's energy. The difference is letting the whole individual with all their life pieces show up to work and discover their energy directed toward a joint vision ... not concentrating on manipulation to derive short term compliance.

Many other possible interventions for innovative companies to explore this different mindset exist. The authors have, within their own organizational experiences, used interventions in a variety of organizational processes to engage the entire

individual. One intervention, for example, is focused on the very first set of interactions between an organization and the individual – the hiring process. “Why are you here?” becomes the key question. “What have you done,” and “what qualifications do you have?” become only supporting information. This sets the stage for interactions between the employee and the organization throughout their tenure. In another realm of organizational work, strategic planning, the emphasis on plan creation and deployment can also be shifted. Strategic plans are checked against energy for accomplishment, not just whether or not the plan is the right one. This serves to stem the tide of failed strategies, since the reason for failure most often is not that the strategy was wrong, but that the strategy was simply not accomplished. Finding out first whether there is any commitment to accomplishing the strategy can save a lot of wasted energy and expectations. Finally, a third area that organizations can develop is the creation of work plans that become part of a more holistic life plan. Incorporating life planning as part of the business setting establishes a foundation for integration rather than separation. Declarations of life’s purpose, joy-giving experiences, and creation intentions can be shared in a very natural way, and become a guiding conversation for employees throughout the organization.

Moving forward

Do, have, then, be are often reflected in the progression of lives. Doing certain activities enables an individual to have desired things, resulting in the individual being someone. For example, a person may attend medical school in order to have a MD, fulfilling their desire to become a doctor. The metaphor of soaring, would suggest another way of viewing the progression of lives. What about be, do then have? What if an individual saw himself/herself as a healer and therefore, wanting to increase knowledge in the healing arts, went to medical school, which resulted in getting an MD. The power is in fulfilling a purpose, not achievement for the sake of becoming someone. In other words, we are human beings not human doings.

Individuals often steer clear of the state of being because this state of mind begs the question, being towards what purpose? This can be a frightening thought. The absence of even a partial answer to this question by all employees in an organization leads to the conflict of balance. A phone survey of 1,006 randomly selected Americans by

Yankelovich Partners (1999) captures some interesting perspectives on the search for the meaning of life. Most Americans (76 per cent) believe that a higher being created them for a specific purpose, but only 45 per cent of them say they understand their purpose very well. This then is the real challenge – to figure out how to get a life. Human resource managers and organizational leaders alike must find their own answer to what their live purpose is and then lead or coach others to find their answers. Frankl (1984) summarized this need in his book, *Man’s Search for Meaning*.

Ultimately, man should not ask what the meaning of his life is, but rather he must recognize that it is he who is asked . . . each man is questioned by life; and he can answer to life by answering for his own life; to life he can only respond by being responsible (Frankl, 1984, p. 113).

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