The Standards of Excellence in Work-Life Integration: From Changing Policies to Changing Organizations

Brad Harrington
Jacquelyn B. James
Boston College

Over the past 20 years, work/life issues have become an increasingly pervasive concern for employers and employees. As changes have continued in the composition of working families and as women have found their place in traditionally male-dominated occupations, employers have developed innovative practices that allow employees to find greater balance between their work and home lives (Friedman, Christensen, & DeGroot, 1998). Most often these practices are changes in human resource policies, such as:

• Extension of employee services: The addition of services such as onsite child care, employee health and fitness centers, and concierge services have provided greater convenience for employees and alleviated the need for employees to create their own solutions to some work/life challenges.

• Changes in employee benefits: New benefits programs have been added or modified in the HR portfolio including paid parental leave, resource and referral programs, adoption benefits, domestic partner benefits, and so on.

• Job restructuring initiatives: Greater use of alternative work schedules and loosening of requirements around part-time positions.

• Increased number of initiatives aimed at human resource and organization development including diversity programs, women’s initiatives, leadership development, and cultural change efforts. (For a full review of these kinds of efforts, see Ichniowski, Levine, Kochan, Olson, & Strauss, 1996.)

Despite the many practices that have been implemented, their impact on the work/life climate of organizations is as yet unclear. Few organizations have undertaken a comprehensive assessment of their work/life culture (Lobel & Faught, 1996). As a result, after all these years, questions remain as to how much progress has actually been made in this area. The questions include: Have changes to human resource policies and practices translated into a fundamentally different corporate culture? (see, for example, Lewis, 2001; Berg, Kalleberg, & Appelbaum, 2003). How comfortable are employees in accessing these new work arrangements? (Eaton, 2000, 2003). Is there really a greater number of organizations today that provide not just
policies, but environments that support working people in their pursuit of achieving greater balance and integration between their work and nonwork lives? Or, is it the case that these changes are mainly cosmetic in nature, creating the perception that organizations are more supportive of the whole person while maintaining outdated assumptions and approaches to managing people?

It is not difficult to imagine in the current challenging economic climate that has existed since the year 2000, that a concept such as work/life remains at the margins of corporate concerns. Skeptical corporate leaders are not known for embracing strategies that do not directly translate into enhanced business performance and financial results, especially under the economic conditions of recent years. The purpose of this chapter is to: (a) outline the challenges presented in moving from work/life policies to cultural change, (b) describe the development of a Standards of Excellence Index as a tool for organizations to use as a model for making progress toward organizational change that has staying power, and (c) review what we are learning from early results from organizations that have completed the Standards of Excellence Index (SEI).

THE CHALLENGES OF CULTURAL CHANGE INITIATIVES

The potential disconnect that exists between an organization’s stated policies and the actual practices employed by line managers is hardly unique to the work/life field. Examples abound. Undoubtedly, organizations such as Enron and Worldcom had accounting and fiscal policies in place that claimed to ensure the integrity of their financial statements through mechanisms such as management review processes and internal audits. But, the financial scandals at these and other organizations in recent years illustrate the point that there is often a large gap between what an organization claims to do in its written policies and how it in fact behaves.

Organizational learning experts, most notably Argyris and Schon (1977, 1996), have framed this disconnect between one’s stated intent and one’s actions. These authors differentiate espoused theory, the theory of action to which an individual or organization gives allegiance and that which is communicated to others, from one’s theory-in-use, the theory that actually governs the behavior of an individual or an organization.

For a host of reasons, it has been difficult for organizations to assess whether new work/life policies and programs have in fact become part of a new management paradigm. Organizational work/life literature and research more often focuses on assessing the efficacy of individual human resource (HR) policies and programs in creating more flexible workplaces (see, for example, Edelman, 1996; Lankau & Scandura, 1997; Martinez, 1997; Perlow, 1998). Such research, while highly useful and enlightening, can fail to grasp the “big picture” questions regarding changing organizational paradigms and management belief systems. The research may not answer the questions articulated above regarding policies and their impact on cultural change or whether employees feel inclined to seek out and use flexible work arrangements based on their perception of the acceptance of such programs in their organizations. Eaton (2003), for example, has shown that perceived usability of flexible work-family policies is more important to employees’ commitment and productivity than the presence of formal or informal policies alone (see also Batt & Valeur, 2003).

To some extent, the media and its “Best Lists” (i.e., the 100 Best Places to Work, the Best 100 Companies for Working Mothers, etc.) may have also unintentionally exacerbated the problem of developing policies without changing the culture in which they are embedded. While recognition from such awards has done much to foster interest in and support for organizational work/life efforts, it has, for the most part, maintained the focus on HR policies, which are easier to measure, rather than tackling the more difficult and amorphous goal of changing the culture in a way that has lasting effects.
What is involved in changing a culture? Indeed, how do we define culture within an organization? Cultures exist in every organization. Sometimes they are strong and cohesive, at other times not. But whether strong or weak, culture can be a powerful influence on organizations and their members (see, for example, Peters & Waterman, 1982; Ouchi, 1981; Deal & Kennedy, 1982; Schein, 1985, 1992; Collins & Porras, 1994).

Schein (1985), for example, defined culture as:

> a pattern of basic assumptions—tacitly held beliefs—shared by the members of an organization that has worked well enough to be considered valid and, therefore, to be taught to new members as the correct way to perceive, think, and feel in relation to those problems. (p. 9)

As Schein makes clear, organizational cultures are quite durable and difficult to change. To clarify the difficulty in creating real cultural change versus more surface forms, Schien (1985) distinguished among three levels of culture:

- **Level 1: Artifacts.** The most visible level would include physical space, social environment, written and spoken language, overt behavior, and work output. Work/life policies developed largely within HR might be placed in this category.

- **Level 2: Values.** This refers to ideas of what the culture ought to be as distinguished from what it is. Values that cannot be tested and proved may become guiding principles, but may never become underlying assumptions. As such, they are more espoused values than they are values in use. Advocates of work/life integration policies may be placed in this category along with researchers and practitioners. Some companies may have elaborate values statements about the importance of employees as whole people and people with needs outside of work, but these values may grudge against a stubborn culture with a very different view of workers.

- **Level 3: Basic underlying assumptions.** Basic assumptions are those beliefs that are so taken for granted that one finds little variation within a cultural unit. Members in the unit would find behavior based on any other premise inconceivable. As Jacobs and Gerson (2004) pointed out, such beliefs about the value of face time and long hours, especially for the professional class, are deeply resistant to change.

Schein argued that the term “culture” should be reserved for the deeper level of “basic assumptions and beliefs” [italics added] that are shared by members of an organization. He suggested that, too often, what operates at a surface level is construed as the organizational culture; when in fact it is merely an artifact which may or may not accurately represent the essential culture of the organization. The assumptions and beliefs that Schein referred to are actually the learned responses of a group to its problems of survival in its external environment and its problems of internal integration. If we accept Schein’s assertion that culture is really grounded in these basic underlying assumptions, it is easy to understand how difficult it is to succeed in a cultural change effort in an organization of any size. Leaders, not to mention the rest of us, are probably not frequently in the mode of rethinking their underlying assumptions. Schein saw culture and leadership as inseparable: One cannot separate the process of leadership from the process of building a culture. One might go as far as to say that a unique function of leadership, as contrasted with management or administration, is the creation and management of culture (Schein, 1985).

Finally, Schein also discussed how leaders can shape culture through what he called embedding mechanisms: what leaders pay attention to, measure, and control; how they role model, teach, and coach; how they react to critical incidents; and how they allocate rewards. Given our knowledge of the difficulties in changing culture and the relationship between culture and leadership, it follows that leadership must play a key role when one thinks about how to move an organizational culture toward supporting work/life integration initiatives.
THE STANDARDS OF EXCELLENCE WORK/LIFE INTEGRATION PROJECT

What spurs leaders to deeper commitment to work/life initiatives? Surely such programs as *Fortune Magazine*'s list of "100 Best Companies to Work For" and *Working Mother Magazine*'s, "Best Companies for Working Mothers" have inspired the development of benefits and policies that get visible and proactive companies on these lists. But, as we have said, these programs and policies do not necessarily translate into deeper organizational commitment to "family-friendly" environments. Therefore, there is a great need in the field for moving the conversation within organizations beyond programs and policies to a broader assessment of the organizational culture. In our view, companies needed a concrete and specific method for evaluating their progress in creating a family-friendly environment. Therefore, we convened a group of experts to develop criteria for standards of excellence for work/life integration.

At the outset, we drew from organizational learning theorists who suggest important pre-requisites for learning to take place and for increasing the likelihood that substantive change will occur. These include, but are not limited to, ownership of the problem by top management, the availability of a structured model, the provision of assessment methods and measurement, and the possibility for benchmarking. While the existence of each of these elements does not ensure success, the absence of any of these will jeopardize the chances of making difficult cultural change efforts "stick" (Argyris & Schon, 1977, 1996; Senge, 1990; Shib, Graham, & Walden, 1993). We will use each of these pre-requisites for organizational change to show the ways that they informed the development of the Standards Index.

Placing Ownership with Senior Management

As we have seen with Schein's (1985, 1992, 1993, 1999) research on organizational culture and leadership, organizationwide cultural change is not likely to occur if the learning is focused on one segment of the organization. Too often, we discuss cultural change initiatives with regard to staff functions, such as the professional human resources community, focusing on the things they need to know and learn in order to be effective change agents. At best, these approaches represent artifacts of change or change in values statements and fall into the familiar category of "necessary but not sufficient." While HR professionals (whether they be diversity coordinators, work/life directors, organization development specialists, or human resource directors) are key enablers of change efforts, the key to making cultural change is conveying that ownership of the program belongs to line managers. While some specialist activities and policy formulation can be delegated, ownership of the culture cannot.

Therefore, the first step in fostering change from a process perspective is to ask the question, "Who owns this change process?" If the answer is "the HR department," it is unlikely that organizationwide change will occur (Fandray, 2000). In designing the standards, one of the critical considerations from a process perspective was, "Will our list of standards and the accompanying assessment tool help transfer responsibility for creating a supportive work/life culture from human resources (a staff function) to line management?" If so, the likelihood of fostering a cultural change is greatly increased.

The Importance of a Structured Model

Once ownership by line management and specifically senior leaders is made clear, the next challenge for senior managers might be posed as: "Now that I realize I own responsibility for creating the work/life culture, what should I do differently?" Lobel and Faught (1996) have shown that a concept such as work/life is likely doomed to failure if it is not seen as clear, understandable, and relevant. Indeed, leaders in all types of organizations (e.g., in business,
health care, government, etc.) are not inclined to seek opportunities to champion issues that do not seem highly related to their organization’s success and ongoing viability. For many managers, initiatives that are not focused on increasing their ability to satisfy customers, control costs, or make their products and services more highly differentiated are going to have difficulty competing for air time. Work/life, at face value, may seem at best as indirectly related to gaining strategic advantage and, at worst, unrelated. Showing relevance is part of the struggle that we frequently refer to as “making the business case” (see, for example, Scheibl & Dex, 1999).

Professional advocates of successful work/life integration must make the case that satisfied, loyal, healthy and balanced employees are more likely to positively affect customers, costs, and efficiency than employees who are not any of these things. While this argument has some face validity and has been supported by a number of studies (Bailyn, Fletcher, & Kolb, 1997; DeCotiis & Summers, 1987; Rucci, Kirk, & Quinn, 1998), we must concede that the “business case” rationale is based on an indirect (i.e., if you satisfy employees, then they will deliver higher levels of service that will result in greater customer loyalty) rather than a direct (i.e., if you cut costs, you will increase profits) relationship. Clearly, the absence of direct effects makes our case for changing the culture of the workplace to one that is more congenial to the needs of workers outside of work more difficult to sell.

Beyond the fact that work/life is an indirect means to an end, an even more fundamental challenge might be that the notion is abstract. Business leaders are not typically social scientists. They deal with concrete, results-oriented outcomes (e.g., customers, products, bottom-line financial results). Do we believe that most business leaders could clearly articulate what constitutes work/life balance? Furthermore, do many executives even have any personal experience in being balanced? The evidence would suggest not. As Friedman and Lobel (2003) pointed out in “The Happy Workaholics,” many senior executives operate in ways that others would see as imbalanced, such as working very long hours, and yet are happy to do so (see also Jacobs & Gerson, 2004). This does not mean that they cannot be role models or champions for work/life. In fact, Friedman and Lobel indicated that they can promote work/life balance by being authentic, respecting other’s choices, and creating an environment that supports effective balance for their employees rather than cutting back their hours to meet someone else’s definition of balance.

Most business leaders will be reluctant to champion an idea that seems controversial or unrelated, or not directly related, to business success. Supporting work/life balance can clearly be perceived as counterintuitive (i.e., how can having employees working less help companies be more profitable?). Leaders will also be slow to champion issues they do not understand or feel any personal empathy for. It seems virtually certain they will not champion an idea that lacks definition and structure. When it comes to quality, ethics, humanistic corporate cultures, and, yes, work/life, as we developed the Standards of Excellence we knew that we needed to provide leaders with a template that helps them understand and operationalize what constitutes work/life integration in their organization.

This is exactly what the national quality standards that were the basis of the Baldrige Award did for the quality movement. Created in 1987, the Malcolm Baldrige National Quality Award began setting forth guidelines and criteria that organizations can use to assess their ongoing quality improvement initiatives in a standardized manner. Indeed, many organizations use the Baldrige criteria to conduct a comprehensive organizational self-assessment and benchmark their organizations’ performance. The seven key elements of the Baldrige criteria are leadership; strategic planning; customer and market focus; measurement, analysis, and knowledge management; human resources; process management; and business results.

While the Baldrige Award stimulated significant interest in and response from many sectors of the economy (i.e., business, government, health care, education), many would suggest that the award criteria have been more important than the award itself in helping organizations make a cultural change toward total quality management. While only a relative handful of U.S.
companies win or even apply for the Baldrige Award, the award criteria are widely used across many organizations as a means of self-assessment. Just 4 years after its creation, Garvin (1991) argued that the Baldrige Award and its criteria had “become the most important catalyst for transforming American business. More than any other public or private initiative, this award has reshaped managers’ thinking and behavior” (p. 80). Therefore, the Baldrige model was a good one to emulate in developing the Standards of Excellence, a similar assessment not so much of organizational quality and strength, but rather an assessment of the work/life culture within an organization.

One reason the Baldrige Award became so popular among businesses is that the criteria are neither too specific (e.g., just product or service oriented) nor so broad that only a few organizations can relate to them. Just as the Baldrige Award makes tangible those abstract concepts (e.g., leadership and organizational culture) that affect quality management, the intent of the standards criteria is to make tangible those abstract concepts that are critical to work/life excellence. As will be seen, both the Standards of Excellence in Work/Life Integration and the Baldrige criteria provide tools for assessing organizations from a comprehensive organizational perspective that makes senior management buy-in and participation extremely important. Both measures also provide leaders with a tool to assess their own performance.

The value of such structured models for inspiring organizational change cannot be understated. To illustrate, in a study of organizational learning in a high-tech company in the 1990s, Harrington (2000) found that organizationwide adoption of quality improvement methods was facilitated by just such a model. Quality improvement, or Total Quality Management (TQM) as it is widely known, has some of the same characteristics as work/life initiatives and suffered some of the same barriers to implementation: Quality was an abstract notion; quality improvement presented the promise of better business results without a clear connection to the “bottom line”; and quality was a nonmainstream issue that required significant management attention, commitment, and involvement in order for successful implementation to occur. Participants in the study indicated that successful implementation of TQM in their organization was strongly facilitated by the use of a structured model, in this case a problem-solving model, which was concrete, clearly defined, and measurable. Using the model not only allowed managers to operationalize “quality” in an actionable way, but also allowed the leaders to measure and monitor progress in the implementation of their quality program. Such monitoring would not have been possible if it were not for the use of a structured model that clearly outlined observable steps and progress in the implementation of the quality program.

The Importance of Assessment Methods and Measures

If the term work/life is an abstraction, its implementation will be dramatically stalled. But, even making the concept more concrete through a structured model does not eliminate the uphill challenge to its implementation. In a corporate world that is increasingly measured (and often punished) by Wall Street for “bottom-line” financial performance indicators, giving careful consideration to other important business indicators can prove difficult. This is especially true of initiatives where current status or progress cannot be measured. As the old business cliché goes, “What gets measured gets done,” and for better or worse, the one business metric that trumps all others is financial. In recent years, however, the quality movement has had a positive impact on encouraging the use of a broader set of business measures to calibrate the “health and well-being” of the business. One manifestation of this has been in the rise of the use of the “balanced scorecard” in many businesses. As Kaplan and Norton (1993) pointed out in “Putting the Balanced Scorecard to Work”:

Executives may introduce new strategies and innovative operating processes intended to achieve breakthrough performance, then continue to use the same, short-term financial indicators they have
used for decades, measures like return-on-investment, sales growth, and operating income. These managers fail not only to introduce new measures to monitor new goals and processes but also to question whether or not their new measures are relevant to the new initiatives. (p. 2)

It is worth noting that without a means to: (a) get work/life on the radar screen of senior management and (b) develop tangible measures of progress, it is unlikely that work/life initiatives (or other similar initiatives that do not show a clear or obvious connection to the “bottom line”) will garner much management attention. Furthermore, without appropriate measures available, it is likely that senior managers will feel that measuring progress in this area is not even possible. As a result, the lack of a rigorous measurement may increase their tendency to simply choose not to address this issue as other more tangible and measurable concerns will continue to attract management attention (Davidson, 1998).

Benchmarking, Sharing and Seeing Best Practices

Since Xerox Corporation first began benchmarking against its Japanese competitors in 1979, businesses have increasingly turned to benchmarking to improve organizational performance and gain an edge over competitors (Gordon, 1999). At a basic level, benchmarking is a formal process used to gather information on other organizations’ practices.

Fedor, Parsons, and Shalley (1996) defined four types of benchmarking: internal, industry, competitive, and best-in-class. As its name suggests, internal benchmarking occurs between departments or business units within the same organization. Industry benchmarking, on the other hand, takes place between organizations that are in the same industry but do not necessarily compete directly with one another. With competitive benchmarking, companies compare themselves against other organizations that compete with them for products or services. Finally, with best-in-class benchmarking, companies gather intelligence on organizations that are known to be superb in specific business areas. Southwest Airlines, for example, has often been considered a best practice company in the areas of employee recruitment and customer service (Stoughton, 2001) and is a popular company for firms to benchmark against that have no affiliation to the airline or transportation industries.

The type of benchmarking that companies choose ultimately depends on what they are interested in measuring and the benchmarking resources that are available to them. Regardless of the type of benchmarking chosen, the process will usually follow four distinct phases (Fedor et al., 1996). In Phase 1, the primary self-assessment takes place and the organization determines which functions or processes to measure. In Phase 2, the organization identifies partners to benchmark against and establishes those relationships. The third phase of benchmarking involves gathering data and analyzing significant gaps in performance. The fourth phase involves designing and implementing a program to deal with gaps. Organizational culture plays a strong role in this last phase, as the adaptiveness and openness of the culture will significantly influence the degree to which the organization accepts the proposed changes.

Benchmarking does have its limitations, and time and cost are at the top of this list. Thus, companies need to carefully consider the type of benchmarking that they choose. The results from best-in-class benchmarking may offer significant performance gaps that companies can strive to achieve, but having an understanding of these gaps may prove fruitless and countermotivational if the company lacks the resources to implement them. Moreover, if the company’s culture or strategy does not fit with the strategies proposed in the benchmarking implementation, the entire process will be of no use.

With its acknowledged limitations, benchmarking can provide an effective way to identify both areas needing improvement and potential methods for doing so. In this way, it can serve as a catalyst for learning and progress. But, a key challenge in any cultural change initiative is to find ways to maintain momentum over time. As Kotter (1995) has observed, a mortal yet
common sin in striving for cultural change is to assume it can be done quickly and, therefore, declare victory too early. Organizations must find ways to keep the change project going.

Taken together, the evidence presented above guided the development of the Standards of Excellence in Work/Life Integration as a strategy for catalyzing organizational change toward greater understanding and appreciation of the importance of work, family, and other personal concerns in the lives of workers. Using the Baldrige criteria as a guide and organizational learning concepts as theoretical underpinning, it was important to make ownership of the change process clear, use a structured model to make the learning more concrete, utilize measurement to facilitate the ability to see progress, and make benchmarking possible in order to accelerate progress.

To realize these lofty aims, we assembled a team of leading work/life practitioners from American corporations, leading academics in the field of work-family research, organizational development experts, and Boston College Center for Work and Family staff to develop the Standards of Excellence criteria. Seven elements were identified: leadership, strategy, infrastructure, accountability, relationships, communication, and measurement, all of which will be described in more detail below. Then, over the course of 2 years, a smaller group representing the experts mentioned above developed concrete indicators of each element. This aspect of the project was designated the Standards of Excellence Index (SEI), a measure that makes it possible for an organization to conduct a comprehensive assessment of its work/life culture. In short, the SEI is a measure of the extent to which an organization realizes the Standards of Excellence criteria. At the outset, the entire project was designed to shape the national dialogue on work/life integration (on a macro-level) and to ensure that organizational work/life policies were being translated into action and becoming an integral part of the way that leaders manage.

THE STANDARDS OF EXCELLENCE INDEX AS AN ASSESSMENT TOOL

As we have said, the Standards of Excellence are comprised of seven components. The seven components, their definition, and supporting logic include the following:

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

During a change process, as Schein (1985, 1992) has pointed out, leaders are role models for all organization members. Employees look to leaders for information, guidance, and cues regarding the changes that are occurring. It is important that leaders have a clear sense of direction regarding the pending organizational change and align their communication and behavior to be consistent with the change initiative’s desired result. In times of change, leaders’ behavior will be scrutinized by employees to see if they “practice what they preach.” While many leaders may make different personal choices for themselves (i.e., they may work very long hours and not see this as an inherent conflict due to their strong career identity), it is important that they convey respect and support for the choices and priorities of their employees (Friedman & Lobel, 2003).

Thus, the Standards Index was designed to assess leadership, that is, the extent to which leaders understand and communicate the importance of work/life integration and create an atmosphere of support for employees’ work/life choices. Using an eight-item scale, raters are asked to assess the extent to which leaders are working to build a culture where work/life integration is valued (Table 32.1 presents all elements and items).
TABLE 32.1  
Standards of Excellence Index

Leadership
1.1 Leaders are working to build a culture where work/life integration\(^1\) is valued.
1.2 Leaders communicate the importance of work/life\(^2\) for the organizations’ to other managers and employees.
1.3 Leaders communicate the importance of work/life to other organizations by promoting its “best practices.”
1.4 Leaders reward those within the organization who support work/life needs and initiatives.
1.5 Through their behaviors (e.g., role modeling, sharing their own work/life experiences, listening, showing empathy), leaders create an environment conducive to work/life integration.
1.6 Leaders support work/life strategies and programs as a means of enhancing work productivity and effectiveness.
1.7 Leaders include work/life in an organizational recruitment and retention plan.
1.8 Leaders represent diverse groups, including those from different ethnic and gender groups.
1.9 Leaders include those who work a variety of schedules.
1.10 Leaders consider employee workloads in making business decisions.
1.11 The leadership development process considers both organizational and individual needs.
1.12 Leaders trust and respect their employees as the foundation for an effective organization.
1.13 Managers\(^3\) discuss the integration between career and life goals with employees.
1.14 Managers evaluate employee performance on results, regardless of work schedule or work location (e.g., telecommuting).
1.15 Managers are empowered to use work/life policies and programs to meet both organizational and individual needs.
1.16 Managers are rewarded for using work/life policies and programs to meet both.

Strategy
2.1 The organization has a separate work/life vision and mission.
2.2 The organization has a separate work/life strategic plan.
2.3 The business case for work/life is included in the organization’s vision and mission.
2.4 Organization identifies important work/life issues for the business, the employees, and the communities in which it operates.
2.5 Work/life strategies are applied throughout the organization (regardless of geographic location or section of the organization, if applicable).
2.6 Organization’s work/life strategy is directed at the broadest spectrum of employees possible.
2.7 Strategic plans take into account changing workforce needs (e.g., societal demographic trends, business trends, other changes).
2.8 Organization creates long-term strategies to address the work/life needs of the next generation of workers.
2.9 The organization uses its understanding of community resources to develop its own work/life benefits (e.g., day-care centers, after-school programs, etc.).
2.10 Organization uses its resources (financial, human, etc.) to have a positive impact on the communities where it is located.
2.11 The overall culture of the organization is consistent with work/life practices.
2.12 Strategies are designed to create or sustain an organizational culture that supports work/life integration.
2.13 Work/life strategy contains the elements of a good strategic plan (i.e., makes the business case, addresses potential barriers, has measurable goals, etc.).
2.14 Work/life strategies and programs are developed using appropriate data sources (e.g., employee surveys, external benchmarking, research).

Infrastructure
3.1 New work/life initiatives (programs, policies, and services) are integrated with existing programs and policies (as appropriate).
3.2 Sufficient resources are allocated to work/life programs (either budget or time or staff).
3.3 Managers receive training about work/life strategies.
3.4 Managers are trained to help employees work through work/life issues and conflicts.
3.5 Employees are educated about the availability of work/life programs and benefits.
3.6 Policies and guidelines to support work/life strategies are developed (as needed).
3.7 The organization has a set of programs and policies tailored to the needs of its employees.
3.8 The organization provides tools and opportunities (e.g., education, training, interpretation) for departments to implement work/life programs and policies.

Accountability
4.1 Leaders are held accountable for balancing business goals with work/life initiatives.
4.2 Leaders encourage employees to use a range of work/life programs, services, and policies to achieve better work/life integration and meet business goals.

(continued)
### TABLE 32.1 (Continued)

4.3 Managers are held accountable for implementing work/life programs and policies (consistent with organizational goals).
4.4 Managers and employees are responsible for working together to achieve work/life integration (consistent with organizational objectives).
4.5 Employees in the organization understand that some jobs, opportunities, and assignments are less conducive to better work/life integration.
4.6 The performance management system for managers is linked to work/life efforts and effectiveness.
4.7 The informal systems at the organization support work/life integration (e.g., promotions, new opportunities, etc.).

### Relationship Building
5.1 Work/life professionals work with those in other departments to integrate the work/life function into the culture of the organization.
5.2 Organization collaborates with external organizations to provide effective work/life solutions (e.g., child care, elder care, after-school programs).
5.3 Organization contributes to the work/life field through collaboration and support for professional organizations (e.g., work/life associations, research organizations, etc.).
5.4 Organization communicates the importance of employee involvement in communities.
5.5 Organization establishes programs to facilitate employee involvement in communities.
5.6 Organization works with public policymakers to strengthen policies that benefit both employers and individuals.

### Communication
6.1 The business case for work/life has been clearly communicated throughout the organization.
6.2 Employees receive regular communications about work/life strategies.
6.3 Employees feel free to openly discuss work/life issues in the workplace.
6.4 Direct communication with work/life professionals is available to employees throughout the organization.
6.5 The organization shares its work/life policies, programs, and strategy with other organizations.
6.6 The organization acts as an advocate for work/life issues (e.g., serving on community boards, etc.).
6.7 The organization communicates with other practitioners through professional work/life organizations.
6.8 Managers communicate and listen to their employees regarding work/life issues.
6.9 Work/life is publicly communicated as one component of organizational identity.

### Measurement
7.1 Work/life strategy has measurable goals and objectives.
7.2 The organization collects work/life information (e.g., demographics, future trends, etc.) from its employees on a regular basis.
7.3 The organization uses the information collected from its employees to plan new programs and policies.
7.4 The organization measures the work/life needs of its employees.
7.5 The organization tracks the utilization of its work/life initiatives.
7.6 The organization tracks the effectiveness of its work/life initiatives.
7.7 The organization tracks satisfaction as part of its work/life efforts.
7.8 The organization tracks information related to the workload of its employees.
7.9 The organization examines the relationship between work/life programs and outcome measures (e.g., productivity, quality of work, etc.).
7.10 Cost-benefit ratios or other “return-on-investment” analyses are conducted to examine the impact of work/life programs.
7.11 Measurement data are used to identify obstacles to implementing work/life programs and policies.
7.12 Research findings are used to develop and improve work/life programs.
7.13 Regular benchmarking is conducted to compare the organization’s work/life practices with other organizations.

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1 “Work/life integration” is defined as: “the complementary pursuit of work and nonwork goals and activities.”
2 “Work/life” is defined as: “Actions taken by employers and employees to help the workforce effectively handle the pressures and responsibilities of work and personal lives as a means toward, meeting the organization’s business goals.”
3 The term “manager” is used throughout the Index to refer to an individual who supervises at least one other employee. In some organizations, the term “supervisor” or another term may be used for this individual.
(2) Strategy: The work/life strategic plan supports the vision, goals, and priorities of the organization and its employees.

Research has shown that managers’ ability to seek, respond to, and utilize feedback is critical to strategic planning (Argyris, 1990). However, managers’ perceptions of current organizational conditions can often be inaccurate. This can generate a false sense of effectiveness and/or within the organization and can subsequently create resistance to any organizational change among managers (Mezias & Starbuck, 2003).

A coherent framework developed from a comprehensive assessment of the organization and its environment should guide organizational strategic planning. The Excellence Index is designed to assist managers in conducting this comprehensive internal assessment by rating the existing work/life culture in their organizations. Establishing a good fit between organizational activities and both the mission and culture of the organization is also critical to the development and implementation of a strategic work/life plan. As we have seen, the same work/life integration efforts will not work for every business—there is no one right path to achieving excellence in this area (Kelly, 1999). Success in work/life integration is directly tied to the specific needs of the business and its employees.

An effective work/life strategy should make the business case for work/life integration and address potential barriers to achieving work/life integration for both the organization and its employees and identify explicit, measurable goals that stem from the vision and priorities of the organization and its employees (Bailyn et al., 1997; Kelly, 1999). Work/life strategy should be based on data gathered from an internal assessment of the organization (i.e., employees’ needs, current culture, existing work/life policies, organizational structure and business challenges, and an external assessment of other organizations’ best practices, community needs, and resources available). The SEI is designed to facilitate dialogue within an organization that considers the individual needs of the organization and its employees.

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

Infrastructure serves as the basic framework necessary for an organization to function. Organizations seeking to establish or to further enhance their work/life strategy must have the appropriate infrastructure in place to support the development and implementation of their efforts. Infrastructure elements need to support work/life strategies by: dedicating the necessary financial, technological, and human resources (i.e., funding, time, and staff); providing education and training opportunities; and developing and implementing congruent policies and procedures.

Without appropriate resources, even the most developed initiatives will have difficulty thriving. Infrastructure serves as the foundation for work/life integration within an organization. It includes having the tools and opportunities to provide education and training to departments and/or individuals (i.e., managers and employees) on how to implement work/life programs and policies.

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

If cultural change is to take place within an organization, the management of work and personal life should be a shared responsibility among managers and employees. Leaders must be able to balance business goals with the work/life needs of employees. At the same time, managers need to achieve business results while creating a “people-friendly” work environment and employees must understand their roles and responsibilities in both the implementation of work/life initiatives as well as the attainment of business success. Achieving work/life integration that fits with the culture of an organization will ultimately involve choice and compromise for both employees and employers. Here, it is also important that managerial performance assessment reflects the organizational accountability system.
(5) Relationship building: The organization promotes a culture built on relationships of respect and mutual prosperity with its employee and community partners.

Organizations skilled at relationship building promote a culture built on respect and mutual prosperity (Mirvis, Pitt-Catsouphes, Lewis, & Litchfield, 1997). They strive to obtain the confidence, support, and trust of all stakeholder groups including investors, customers, employees, and the communities in which they reside. In an effective work/life program, the employer works in concert with the employees, and the community in order to develop a comprehensive and effective support system. This three-way partnership (or relationship) is a fundamental building block of success in the work/life arena (Pitt-Catsouphes, Fassler, & Googins, 1998). No one group working in isolation can be effective without the active engagement and commitment of the others. Thus, it is critical that the organization assess and develop its competencies in relationship building and use these to outline, plan, and deploy comprehensive and effective work/life solutions. Such efforts benefit not only the employees and employers, but also foster an effective community in which the organization operates. Six items comprise this scale.

(6) Communication: The organization’s work/life strategy and resources are consistently and effectively promoted in communications, both internal and external.

Communication plays a critical role in the functioning of any organization. Organizational communication conveys information and ideas through the transfer and understanding of meaning, fosters motivation among employees by clarifying job tasks and providing performance feedback, and acts as a vehicle for the emotional expression of feelings and fulfillment of social needs. At no time is organizational communication more important than during times of change (Kanter, 1983; Shiba et al., 1993; Kotter, 1995).

Although effective and genuine communication is instrumental to the success of an organization, “silence” is pervasive in organizations, as many employees feel that keeping quiet about their needs, desires, and differences is the best way to accomplish tasks and preserve relationships with others. Organizational silence can be extremely costly to both the organization and the individual as it often leads to increased negative emotions within the organization (Perlow & Williams, 2003). Such negative emotions often decrease employees’ satisfaction, productivity, and commitment to the organization.

The issues surrounding work and family are an example of an organizational issue about which employees often remain silent. Worried that they will appear uncommitted or denied promotional opportunities, employees frequently hesitate to express their needs or offer suggestions that might help the organization assist them in achieving a greater balance. In this silence, anxiety and resentment can develop and negatively affect employee satisfaction, productivity, and retention. To prevent these negative repercussions, it is critical that an organization’s work/life strategy and resources are well communicated and are based in a thorough understanding of employees’ needs. This also drives home the point that management needs to own the process.

Although emphasis is often placed on the internal communication of work/life culture, external communication is equally important. Through external communication of work/life efforts, organizations can share best practices with one another, attract talented candidates for employment, and impact the communities where their employees live and work by influencing policymakers and civic leaders. This influence can result in local social programs and services that complement the efforts of organizations. These programs, such as after school care and elder care, may eventually reduce the demand placed on the organization to be the sole provider of employee services.

(7) Measurement: The organization strives for continuous improvement of work/life integration through ongoing measurement of its work/life strategies, including evaluation, assessment, feedback, and response.
Most organizations view measurement as the primary means of gauging the effectiveness of policies, programs, or strategies. As mentioned, what gets measured in organizations is often what receives the most attention from leaders. Likewise, in addition to the need for financial metrics, it is important to assess the overall health of an organization in terms of employee productivity, satisfaction, retention, and utilization rates of various policies and benefits. Measurement data can be used to identify areas of organizational strength and weakness as well as to benchmark the organization’s practices and performance with other organizations.

The Excellence Index can facilitate effective measurement of work/life integration efforts by dividing organizational performance into discrete and observable criteria. Focusing attention on tangible metrics adds credibility to these efforts and provides organizations with a catalyst for discussion and the basis for action to create sustainable change. Measurement of work/life strategies can help to justify the expenditure of resources for related efforts, including both financial and human capital.

Since its development in 2002, the SEI has been used by 57 mostly Fortune 100 companies where two or three professionals representing work/life advocacy (predominantly member of the human resources function) within the organization were invited by senior leaders or senior HR vice presidents to rate the company in the seven elements. These have been used to build a national database of scores that can be used for comparison purposes (total n = 113). (In several instances, 25 to 30 professionals across the organization have used the SEI to assess differences in success in different divisions of the company; these sets of scores are not included in the national database.) As it stands, the scores from the national database can be said to be representative of mostly HR representatives from large corporate entities in the United States. Even so, an organization’s ratings on the SEI have been assigned by subjective raters and therefore are limited by the knowledge and experience of the raters and their sometimes differing views of the organization’s strengths and weaknesses.

Each scale in the Standards Index involves rating the item on a Likert scale indicating the extent to which the indicator has been established within an organization, from 1 (not at all) to 5 (a great deal). Scores are then summed for each of the seven elements and standardized for comparison across scales of differing lengths. Thus, a score is established for how the organization is currently performing on each of the essential elements. Cronbach’s alpha for reliability for six of the seven scales were highly acceptable ranging from .70 to 91.

Table 32.2 presents descriptive results from the national database as it exists today and the correlations among items. As the table shows, the scales are highly correlated with each other. This should not be surprising given the fact that all scales measure some aspect of work/life culture. We maintain, however, that they are conceptually distinct, especially given the important differences that scores on the different scales reveal.

Figure 32.1 presents average scores on the SEI by each element. There are striking similarities across organizations in terms of organizational strengths and areas that need focus and attention. As can be seen, organizations are reporting generally high scores in the elements of relationship building and communications, while ratings on issues of leadership, measurement, and accountability are quite low. These results suggest that the element of relationship building is the area where the greatest work/life progress has been made, with an average score of 60 (out of a possible 100). In general, our participating organizations exhibit a strong commitment to community involvement, establish programs to facilitate employee involvement in communities, and use their resources (financial, human, etc.) to have a positive impact on the communities where they are located. The national database organizations also demonstrate their interest in being a part of the work/life field through communicating with other practitioners and supporting professional organizations. In addition, they develop work/life programs and policies geared to the needs of employees. These include direct communication with work/life professionals and the integration of new work/life programs with existing ones.
### TABLE 32.2
Standards of Excellence Scales

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** $p < .01$ L = Leadership \ S = Strategy \ I = Infrastructure \ A = Accountability \ R.B. = Relationship Building \ C = Communication \ M = Measurement

as well as tailoring them to the needs of employees. Finally, the organizations in the national database feel positively about the way they convey respect for employees. Over two thirds of respondents felt that this was true either "quite a bit" or "a great deal." Of course, it stands to reason that a company interested in taking the risk of assessing work/life culture (volunteering to submit to this kind of scrutiny), and HR personnel in general, would have strengths that bias the sample in some ways.

Still, considerable weaknesses were reported. The element of accountability is rated lowest ($M = 28.6$) across all organizations. Spokespersons for the organizations using the SEI do not feel that senior leaders or managers are held accountable for the implementation of work/life
initiatives or that the performance management system for managers is linked to work/life. Performance indicators that scored particularly low suggest that performance management systems for managers are not linked to work/life efforts and effectiveness, leaders are not held accountable for balancing business goals with work/life initiatives, and managers are not held accountable for implementing work/life programs and policies (consistent with organizational goals).

Results from our participating organizations also suggest that rewards for work/life are lacking in their organizations and that many measurement issues are not being addressed. Half of the lowest rated indicators for the national database organizations are in the area of measurement. These indicators suggest a failure to relate work/life with outcomes, to collect work/life information on a regular basis, or to use data in identifying obstacles to implementing work/life programs.

USEFULNESS OF THE STANDARDS OF EXCELLENCE INDEX

We must emphasize that the SEI is designed primarily as a self-assessment tool that can be useful to organizations regardless of their size or sector. Moreover, it was developed as a tool for learning and improvement, not for organizational rankings or awards systems. Indeed, benchmarking comparison scores are used in their aggregate form and convey no identifying information about the companies in the database. This means that the ultimate measure of the effectiveness of the SEI lies in its usefulness to practitioners in evaluating the state of
organizational work/life efforts and in planning future interventions and initiatives. Although it was not originally intended for academic research purposes, its usefulness could only be expanded by systematic uses in noncorporate settings.

In general, company representatives can use results from the SEI to assess the current level of work/life integration for a particular subset of an organization (e.g., functional department, business unit, or geographic region) or for the organization as a whole. For purposes of conversation, and recognizing the limitations of cross-company comparisons, company representatives are usually interested in benchmarking against the national database even though there are differences in the kinds of businesses and sectors of the economy represented (pharmaceutical, high-tech, banking, insurance, automotive/transportation, and so on).

For some organizations, use of the SEI may be the first step in developing a work/life integration strategy, potentially representing a major organizational change process. For other organizations that are more advanced in their work/life initiatives, the Excellence Index can be used to gauge the effectiveness of work/life efforts in driving organizational culture. Subsequently, for these organizations modification of their current work/life integration strategy may involve more minor changes aimed at issues of sustainability or ongoing improvement.

The SEI can be used in different ways by different companies. The national database described above was created with responses from work/life directors from different companies. Other companies have conducted larger surveys of a business unit or the organization as a whole. This more comprehensive view of the current work/life culture can highlight areas of strength and weakness across units. At least three organizations have taken this approach with the instrument so far, an insufficient number for reporting results at this point. We hope, too, that some organizations will follow up with a new survey after some additional change efforts have been made to assess the impact of their efforts.

How are the results used in an organization? As one begins to develop an action plan for enhancing work/life integration, he or she may want to consider the following:

1. Who else should view these results and be involved in developing the organization’s plan for work/life integration?
2. What are the organization’s strengths (areas of excellence) and weaknesses (or areas of improvement) in work/life integration?
3. What areas of work/life integration are of highest priority for the organization? Where should the focus be?
4. What are the organization’s objectives for work/life integration?
5. How should one start?

When used in these ways, the SEI can be a catalyst for change. As with any business activity or function, having a plan is critical. In order to develop a working hypothesis for how to make work/life an integral part of the organization, a strategic plan is key and the SEI can become a critical ingredient in the planning process. Especially if a cross-section of managers has helped to develop this snapshot of the current situation, they have provided powerful information for the purposes of planning. These same managers may also have a vested interest in becoming engaged in the planning process and their involvement can be critical to the success of the implementation.

An effective strategy also includes a vision of the future state an organization is hoping to achieve. The Standards Index helps facilitate this by laying out indicators that, in effect, describe what a world-class organization would look like in this arena. Strategic plans that are too general or too abstract are not likely to enable effective implementation. The standards provide a high degree of granularity and specificity in describing areas of focus as well as organizational strengths and weaknesses. This will allow an organization to pinpoint and plan
precisely around the areas that need to be improved in the future and in what sequence. Using the SEI results in the context of a strategy formulation process will allow an organization's management team to discuss and decide what elements might be most critical to address first in order to gain the greatest leverage from their efforts.

During meetings to formulate a strategic plan and determine a course of action, the results from an SEI can provide a common vocabulary and be a useful reference document for developing a comprehensive plan that addresses an organization's priorities and areas of focus.

The Standards Project team members also developed some companion tools intended to help an organization move forward. Most notably, they developed an *E-Handbook*, an online database of company best practices resources and tools that have been used successfully by organizations in advancing their work-life initiatives.

**DISCUSSION**

The Standards of Excellence in Work/Life Integration were developed to respond to a pressing need felt by many corporate human resource practitioners. Their intent is to move the work/life dialogue away from HR policies toward measures of the degree to which the work/life has become integrated into the fabric of the organization. The question the Standards Index tries to address is, "To what degree does an organization integrate a work/life perspective in the way it manages our people?" The SEI was developed by a team of scholars and leading practitioners as a self-assessment tool to measure this cultural change. It incorporates ideas derived from both organizational change literature (i.e., what does it take to mobilize change in an organization) and organizational learning literature (what factors will help to facilitate organizational learning and lasting change?).

The index is a learning tool, not a ranking system. The intent is to help HR practitioners better understand and communicate the state of their organization's work/life culture to management and to transfer responsibility for the cultural transformation to the senior leadership team—ultimately, the only ones who can make this change a reality.

The Standards Index, which has now been used by more than 60 organizations for the purposes of calibrating their work/life efforts, has begun to surface patterns of strengths and weaknesses in this pursuit of work/life excellence. In terms of strengths, it is clear that organizations feel they are effective at communicating with employees about their programs, working in partnership with communities and external service providers, and providing policies and programs that are tailored to their employees' needs. Work/life practitioners also feel good about their willingness to share their learning and successes with others in the field. In terms of weaknesses, there seems to be a consensus that accountability, leadership, and measurement are areas that need significant focus and attention. It would seem that line managers and senior leaders have not yet stepped up to the challenge of driving a new mindset toward work/life throughout their organizations. Performance management systems do not set expectations or reward performance of managers in this area. Finally, important measures of work/life are not maintained and monitored. Specifically lacking are ones that look at the impact of management decisions on employees' workload. It is clear that among those organizations that have utilized the index, there is still much room for improvement in terms of leadership owning the cultural change process. Of course, the use of the SEI is just a first step to spur organizational change; time will tell whether such change occurs on the basis of the dialogues it inspires.

The SEI has been used primarily as a self-assessment tool, but it also offers opportunities to be used in more formal research. The SEI could provide a template and measurement instrument for any researcher interested in diagnosing, measuring, and monitoring cultural change initiatives relevant to work/life. Used in this context, much could be learned about
what variables (i.e., elements or indicators) are most important in driving organizational change efforts.

While the SEI is still in the early stages of its development, it will hopefully help the field move forward and create lasting organizational change. In 2004, the Standards of Excellence in Work/Life Integration was selected by the Conference Board to receive its Moving Into the Future Award as a significant innovation developed by academics and practitioners to facilitate progress in the work/life field. We believe that it has potential for results in broader contexts as well.

ACKNOWLEDGMENTS

We gratefully acknowledge the following people who made a significant contribution to the Standards project and this chapter: Kathy Lynch, Standards Project Director; Leon Litchfield, the Standards of Excellence Advisory Committee; and Judi Casey and other staff members at the Boston College Center for Work & Family.

REFERENCES


