

**Exploring a Work-Life Balance Impact Audit:  
An Aid to Informed Consensus?**

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### **ABSTRACT.**

The effective management of employees' work-life balance requires organisations to recognise and account for the array of non-work roles that impact their working-lives. Despite the literary attention given to the 'work-life balance' in recent years, however, contemporary authors still note the concept's inadequacy both in terms of its definition and administration. In order to explore the boundaries of contemporary 'work-life balance', this paper adopts an Organisational Role Theory (ORT) perspective. The paper suggests that in order to manage these discrete impacts effectively, human resource managers should consider employing a Work-Life Balance Impact Audit as part of their job evaluation and performance management processes.

*Key Words: Work-life Balance, Organisational Role theory.*

## **INTRODUCTION.**

The effective management of employees' work-life balance (WLB) requires organisations to recognise and account for the array of non-work roles that impact on their working-lives (Higgins & Duxbury, 2005; Howard, D'Onofrio & Boles, 2004). Despite the literary attention given to the WLB in recent years, however, contemporary authors still note the concept's inadequacy both in terms of its definition and administration (Hyman & Summers, 2004; Lewis, Rapoport & Gambles, 2003; Smithson & Stokoe, 2005). In order to explore the definitional boundaries of the WLB, and present strategies to overcome the associated Human Resource Management (HRM) issues, this paper adopts an Organisational Role Theory (ORT) perspective. In particular, this paper will explore ORT's role-taking, role-consensus and role-conflict assumptions to better define the WLB, and present strategies for preventing and/or remedying work-life imbalance issues in the workplace.

## **LITERATURE REVIEW.**

### ***The Work-Life Balance Concept.***

The importance of managing an employee's WLB has increased markedly over the past 20 years (De Bruin & Dupuis, 2004). There have been changes in several areas that directly impact on this issue. Firstly, jobs have become more complex and employees have been put under pressure to produce quality results in shorter timeframes and with fewer resources (Hosie, Forster & Servatos, 2004) that has resulted in a redefinition of 'normal working hours'. Secondly, the demographic make-up of the labour force (i.e. gender, ethnicity, dual career couples, religion, multi-generational workplaces etc), and thirdly the very nature of the employment contract has necessitated that organisations effectively manage their employee's wellbeing, stress and job satisfaction (Greenhaus & Powell, 2006).

Organisational interest in the management of the WLB derives from evidence that "there is little doubt any more that there is a clear connection between the way people are managed and organisational performance" (Purcell, 2002:1), and that with the onset of predicted skill-shortages, the ability to offer effective WLB employment opportunities may become a source of competitive advantage.

Ideally, the WLB concept requires organisations to effectively integrate employees' work and non-work roles such that levels of multiple-role conflict, and the associated stress and job-dissatisfaction, are minimised or avoided (De Bruin & Dupuis, 2004; Greenblatt, 2002). In attempts to achieve a WLB, however, western organisations have tended to adopt a limited set of policies such as on-site child-care facilities, on-site gymnasiums, telecommuting opportunities, and even on-site sleeping quarters for the employee and their family (Hacker & Doolen, 2003; Hyman & Summers, 2004). Each has attempted to increase the flexibility by which employees can enact their work-roles whilst simultaneously enabling them to enact their family-based roles to the minimum extent necessary.

### ***Work-Life Imbalance: Why is the WLB Concept Still an Issue?***

Despite their best intentions, there remains considerable contention about the effectiveness of organisational WLB policies in delivering flexibility and reducing stress and job-dissatisfaction in the modern workplace (Eates, 2004; Kirrane & Buckley, 2004). Researchers have identified two empirical shortcomings within the WLB literature that have served to undermine its theoretical and practical usefulness. The first relates to the WLB literature's almost exclusive focus on the work-family interface at the expense of other important life-balance issues. Buzzanell et al, (2005) notes that the WLB literature typically portrays role conflicts for white, married, professional and managerial women, with little reference to the many other demographics represented in the modern organisation. Shorthose (2004) and Wise and Bond (2003) go so far as to state that the WLB discipline is essentially flawed, as it is 'one-dimensional', assumes a unitary HR perspective, and that its underlying management has been one of maintaining the status-quo rather than the adoption of competitive and future-oriented HR policy.

The second relates to the literature's inability to clearly define the interaction of work and non-work roles that impact employees' working-life (i.e. stress, job satisfaction etc.). Elloy and Smith (2004) and Spinks (2004), for example, state that because an individual's non-work roles are inherently ambiguous and idiosyncratic, organisations are incapable of understanding how their enactment (or otherwise) impacts each individual. Spinks (2004), in particular, suggests that organisations are either

incapable (or unwilling) to understand their workforce in sufficient detail, and have instead defaulted to a 'one-size-fits-all' policy regime that has simply enabled employees to 'stay at work longer' rather than enable them to enact their important non-work roles. The inadequacy of current WLB policy regimes is highlighted by Kiger's (2005) study that revealed that less than two percent of employees actually participate in available WLB programs.

Dex and Smith (2002) cite two main causes for this low figure. The first relates to equity, with many employees reporting that they did not wish to appear a 'special case' or to require 'special treatment' to their colleagues. This is supported from the results of Waters & Bardoel's (2006) study that found a range of workplace cultural factors that reduced the willingness of Australian university staff to access WLB policy options. The second is that the wide range of policies adopted by organisations has been based on an ill-informed conceptualisation of contemporary WLB, and that this has led to its ineffective formalisation in HRM practices. The consequence for organisations not taking a more holistic approach to WLB is increased issues in attraction and retention of employees in the context of skills shortages in significant occupational groups. The work expectations of Generation X (born 1965 to 1979) and generation Y (born 1980 onwards) (Mackay, 1997) place higher importance on WLB than previous generations and these employees will be attracted to and remain longer with organisations that provide flexibility in accordance with individual employee expectations (Henry, 2005). There is evidence of an increase in women managers holding values and goals with greater emphasis on WLB who are opting to leave organisations and undertaking consulting or contracting work which can permit greater control of WLB conflict (Beck & Davis, 2005).

The contribution of the WLB literature, therefore, appears limited in its ability to provide a useful framework for both academics and practitioners alike (Hyman & Summers, 2004). Despite its name, the WLB literature has remained largely focused on the work-family interface and fails to accurately identify and define the array of work and non-roles that impact *inter alia* on an individual's stress levels and job satisfaction (Hacker & Doolen, 2003; Mellor, Mathieu, Barnes-Farrell & Rogelberg, 2001; Noor, 2004; Pocock, 2005). In order to overcome these issues, Elloy and Smith (2003: 63)

suggest that an effective conceptualisation of the WLB requires:

...an holistic approach to human resource management, which implies a greater awareness of the total context of worker's daily lives, not just those hours they spend at work.

Guest (1987, 1997 & 2002) suggests for the WLB literature to incorporate an holistic approach to HR management and better inform organisational HR policy development, its design and implementation should adopt the following four criteria:

- That the WLB literature maintains a focus on the integration of HR policies with the organisations vision, goals and strategy. Central to this point is the consistency between the organisations espoused culture and the context of its WLB approach;
- That the implementation of WLB policies create a set of internally consistent employment policies intended to produce employee commitment, flexibility and quality – mutual flexibility and commitment being a cornerstone of the concept of a WLB programme;
- That there is recognition of the importance of human resources and of the need to engage in practices which reflect this understanding. Therefore, managers internalising (and demonstrating by their behaviour) the importance of human resources is fundamental to the link between WLB goals and their achievement; and
- That there is a response by employees to the WLB policies (i.e. an 'up-take' of WLB opportunities by employees) and to the behaviour of the line managers (i.e. a recognition by employees that their superiors are committed to the achievement of a meaningful WLB).

Therefore, the degree to which employers can support the achievement (and benefits associated with) effective WLB/HR policy depends on two main considerations: the manner in which the WLB is defined and formalised within HR policy, and/or how managers respond to employee requests for WLB relief. In terms of its formalisation, organisations need to be aware of the extent to which WLB is operationalised– that is, whether it is to be regarded as a 'right', a 'right to request', or as a matter of managerial discretion. In terms of managerial responses, organisations need to decide whether to apply an authoritarian approach (i.e. 'hard HR'), a paternal approach (i.e. 'benevolent'), or a commitment (i.e. 'Soft HR') approach to employee requests for WLB relief. It is this intersection between corporate culture, as enacted, in rituals and practices modelled by organisational leaders that

set the tone for employees' responses to WLB initiatives. Where leaders work very long hours, tend to take little annual leave and then in small amounts, demand travel at short notice (Sinclair, 2005) and require employee availability at the leader's whim and wears these sacrifices as 'badges on honour', it follows that employees are, at best, cautious in utilising WLB. The achievement of an effective WLB-HR policy interface has largely failed in Australia given the issues discussed above, and an exploration of possible remedies represents the research opportunity for this paper.

## **APPLYING AN ORT LENS TO THE WLB ISSUE.**

In response to Elloy and Smith's (2003) and Noor's (2004) recommendations, we apply an ORT lens to address the WLB-HR policy issues discussed above. The origins of ORT can be traced back to the work of Katz and Kahn (1966) in their seminal work *The Social Psychology of Organisations*, which provided a conceptualisation of employee's role-adoption and role-enactment behaviours. Specifically, ORT focuses on the roles that individuals enact in social systems that are pre-planned, task-oriented, and hierarchical, and therefore form a vital function in the achievement of organisational goals (Biddle, 1986). According to ORT, the assigned work-roles must be conferred and/or adopted by each individual employee in order for an organisation to function effectively as a social entity. As a social entity, an organisation comprises a nexus of distinct functional groups of employees that have specific work-roles to enact. Under ORT, these distinct functional areas form a 'role-set' for the employee, and determine the specific role-behaviour that the employee is expected to enact in their given context (Katz & Kahn, 1966). As such, the enacted set of role-behaviours essentially mirrors the expectation of other relevant employees, and implies two important points. The first relates to the notion of 'role-taking', which denotes circumstances where an individual will 'take' or accept a role that is conferred upon them by their employer. In the organisational context it is assumed that an individual will 'take' the role required by their employer when they accept an employment position (Katz & Kahn, 1978). Katz and Kahn (1966) also suggest that employees may be required to enact an array of roles, and that this may be problematic if the resultant complexity of results in an employee being unable to enact them according to the expectation of others.

The second relates to the existence of ‘role-consensus’ between employers and their employees. This assumption states that for organisations to function effectively, there needs to be consensus regarding the expectations of enacted roles and the manner in which they interact. Role-consensus serves to underpin the commonly held norms and conceptions that give rise to consistency in behaviour and an adherence to the organisation’s culture (Biddle, 1986). In the organisational context there is assumed consensus on behalf of the organisation when they enter into an employment relationship. As Kerr (1978) argues, the assumption is that organisational roles are pre-defined, agreed upon and static and consensus can be reached. However, this fails to account for the complexity of roles faced by employees, such as roles changing over time and the taking of multiple roles (Kerr, 1978).

In order to control for manifest disagreement (i.e. any variation between role-expectation and actual role-enactment), ORT provides a review framework known as ‘role-episodes’. A role-episode refers to any interaction between employees whereby role-expectations and role-behaviours are manifest in measurable consequences. Where deviance from expected role-enactment is detected (e.g. excessive absenteeism, failure to perform, etc.) management functions such as ‘performance reviews’ or ‘retraining’ allow the organisation to re-confer or clarify role-expectations upon the deviant employee (Katz & Kahn, 1966). Theoretically at least, the role-episode review process is a dynamic one, whereby role-sending and role-receiving continue until the perception of role-enactment conforms to the role-expectations. Unfortunately, research continues to highlight two important issues that undermine the contemporary management of the WLB in the workplace:

- That the role taking assumption does not account for other impacting roles that may influence an employee’s decision to accept a role that is conferred upon them by their employer; and
- That the assumption that employees are one-dimensional limits the organisation in achieving a truly consensual understanding with their employees.

## **THE WLB, HR POLICY AND ROLE-CONFLICT.**

In order to address these theoretical issues, this paper suggests two strategies that involve a review of key HR policies and practices; specifically in the areas of job-analysis/job design, realistic job previews (RJP) and performance management processes. Firstly, we recommend the adoption of a Work-Life Balance Impact Audit system as part of an organisation's job-analysis/job design function. Traditionally, the job-analysis function has served to define each position within an organisation in terms of its tasks, duties, responsibilities and lines of authority and communication. What is needed to complete the WLB picture is a focus on the job size, level of intensity and the extent to which the job impacts on non-work time through intrusive communication channels (such as mobile phones and e-mail technology). Whilst the focus on technical characteristics has served as a basis for defining a position's content and role-set, it has been less successful at underpinning a realistic job preview of the job's impact as recommended in contemporary HR literature (Buda & Charnov, 2003; Phillips, 1998). In order to better provide a realistic job preview, the Work-Life Balance Impact Audit would attempt to define how each organisational position impacts on the incumbent's non-work roles, and provide a more informative basis for understanding the requirements of the position itself. In particular, we suggest that such an audit focus on both existing positions (using incumbent interviews) and for new positions yet to be filled (potentially using external benchmarking data). In particular, we recommend that HR managers adopt a proactive stance in managing their actual and potential employees' expectations, and therefore the manner in which they approach their 'role-taking' within an organisation.

The second strategy would be to integrate the outcomes of the Work-Life Balance Impact Audit into the ongoing performance management function. This would place primary responsibility for the effective implementation of WLB (at the individual employee level) in the hands of their line manager. Line managers would then be better able to discuss the impact of performing the duties on WLB and visa-versa directly with each employee. For this to be given appropriate prominence, the key performance indicator for managers would be their approach and effectiveness in supporting the

employee's WLB. A key focus is for organisations to take a strategic approach to removing the barriers and perceived disincentives for employees to take up WLB options (Waters & Bardoel, 2006). At the operational level, communication within workgroups and individual manager's attitudes are matters for attention.

The potential benefit of the Impact Audit is that by leveraging the positional expectations in the Position Description the organisation is able to increase the likelihood that the role-taking and role-consensus assumptions are being met, in turn reducing the likelihood of role-conflict. The implications of a Work-Life Balance Impact Audit are potentially four-fold. Firstly, it offers the organisation an opportunity to improve their recruitment value proposition by having a program in place to avoid the dysfunctional consequences of role-conflict. Secondly, it allows the organisation to realise time and cost savings by allowing potential candidates to self-select out of the recruitment process should they be unwilling to adopt the work-roles required of a vacant position. Thirdly, it provides a structured mechanism through its use in the performance management process for the monitoring of the level of effectiveness of WLB implementation for individual employees. Fourthly, the implementation of such an audit requires checking the strategic congruence between WLB and corporate strategy, the impact of enacted culture on the implementation of a range of HR policy areas and obtaining feedback from employees (and prospective employees) on the structure and content of WLB and related policies. It raises the possibility of increased flexibility of HR policies to cater for greater diversity (more individual) in employee expectations of workplace flexibility that is more properly described as life and work rather than the current predominant focus on "family friendly".

## **SUMMARY AND CONCLUSION.**

In terms of better defining the WLB boundaries within a firm, this paper recommends that a Work-Life Balance Impact Audit system be adopted to identify the positional expectations intrinsic to individual positions. With such knowledge, both the firm and the employee will have a better understanding of the manner in which a change in work-role is likely to impact their non-work roles, and therefore, their perception of the WLB. The notion of the Work-Life Balance Impact Audit also

has implications for the increased usefulness of ORT in the contemporary organisational setting. It requires an organisation to take a broad perspective that encompasses people management, the implementation of policy and the increasing diversity of employee expectations of flexibility. By potentially addressing the problematic nature of the assumptions implicit in ORT reductions in the dysfunctional nature of role-conflict may be realised producing benefits for the organisation.

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