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Crafting Lives That Work

A SIX-YEAR RETROSPECTIVE ON REDUCED-LOAD WORK
IN THE CAREERS & LIVES OF PROFESSIONALS & MANAGERS

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We are deeply indebted to the 81 men and women who shared their time and insights with us. They were employed by the organizations listed below at the time of the follow-up interviews November 2002-November 2003. We hope, as they do, that other individuals and organizations will benefit from their experiences.

EMPLOYERS IN BOTH STUDY I (1996-1998) & STUDY II (2002-2003)	
United States	Canada
Artel AT&T Bank of America Baxter Healthcare Corporation CIGNA Developmental Evaluation Center Eli Lilly Felpro Forest Hills School Corporation Hewlett Packard/Agilent* Howard Johnson/Merrill Lynch* Honeywell/Allied Signal* IBM Imation/Kodak* Kaiser-Permanente Lincoln National/Swiss Re* Lucent/Avaya* Merck Marriott Nabisco/Kraft* Paragon Re-Insurance Corporation St. Paul Companies Starbucks	Bank of Montreal CBC Radio Compensation Review Board of British Columbia Ernst & Young/Cap Gemini* IBM Imperial Oil KPMG Lever Ponds/Unilever* Nortel Procter & Gamble Royal Bank Xerox

NEW EMPLOYERS IN STUDY II	
United States	Canada
Brigham Young University Convergys Hartford Life Insurance Medtronic Pittsburgh School District	Durham College Encana GDS Associates JDS Uniphase Metcalf Foundation Towers Perrin

**Employer's new name at time of Interview II (as a result of merger, name change, or spin-off) listed after slash.*

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EXECUTIVE SUMMARY

Many leading employers have been formally and informally offering alternative work arrangements such as “reduced-load” work for many years. However, little research has been conducted on how choosing to use these new ways of working affects individuals, their careers, and their families *over time*. This report presents findings from an interview study conducted November 2002 to November 2003 with a sample of professionals and managers who were originally interviewed in 1996 to 1998 about their experiences working on a reduced-load basis, by choice, in 43 companies in the U.S. and Canada.

The purpose of the follow-up study was to learn how professionals who had chosen to work less in the past, for family and life-style reasons, would continue to make choices over time to achieve the kinds of lives they wanted. We wanted to find out what these individuals were doing 6 years later and how their careers, family situations, and personal lives had evolved over time. We also wanted to gather their observations about their jobs and organizations and the kinds of changes that had taken place since the original interview.

“Reduced-load” work is defined as working less than full time, for example, 4 instead of 5 days a week, and being paid less accordingly. The participation rate for our study was 93%, as we were able to locate and interview 81 of the original 87 participants. Our sample is not meant to be representative of all individuals working reduced load in all industries. However, it does give an in-depth and longitudinal perspective on how careers and personal lives unfold for individuals choosing to work in new ways.

HIGHLIGHTS of FINDINGS

- Nearly half (47%) of the participants were still working reduced load 6 years later, most for large organizations, some through self-employment; 38% had returned to full time, and 15% were at home (only 1% due to unemployment).
- On average, participants who continued working reduced load over the 6 years were earning salaries equivalent to those working full time.
- More than 2/3 of those who switched to full time were the primary breadwinners in their families.
- Reduced-load work in an organization was the preferred work status for the majority; many who switched to full-time, self-employment or staying home did so under duress.
- In addition to reduced-load work arrangements, participants used other strategies to help them balance their work, personal and family lives – leaves of absence, career “self-plateauing,” self-employment, career breaks, working from home, and limiting work hours.
- In most organizations, reduced-load work was either supported at the same level or had become more prevalent, even when there was a great deal of internal change or hard economic times.
- A few organizations were less supportive of reduced-load work, often after being acquired by another firm.

In **PART I** of this report, **ABOUT THE STUDY**, we describe the research participants as a group as well as by employment status: 1) those still working on a reduced-load basis; 2) those who were currently working full time at the time of the 2nd interview; and 3) those staying at home. We also provide information on the types of jobs and functional areas in which participants were working, as well as on the organizations that currently employ those in our follow-up sample.

Next, in **PART II, CAREER & LIFE CHANGES OVER TIME**, we talk about what happened with study participants over the 6 years between the 1st and 2nd interviews – how and why they made changes in employers and/or employment status. We also describe the kinds of major life events we heard about and highlight types of peak experiences mentioned by participants. We then summarize information from timelines participants drew to show how their lives had unfolded over time on three dimensions -- career, family, and personal.

PART III, OUTCOMES, is about how things turned out for these participants who experimented with reduced-load work arrangements in the late 90's. We draw on objective measures of career advancement, like number of promotions and increase in salary, as well as interviewer qualitative assessments, and respondents' own self-ratings. We also identify and compare two groups of participants, one where things were going well and the other where things were not going so well. Then we describe participants' views on what career success means to them.

In **PART IV, CRAFTING LIVES THAT WORK**, we focus on what kinds of strategies, approaches or support helped our 81 participants craft the kinds of lives they wanted. These include more work-related strategies or sources of support, as well as family or personal life related approaches or mindsets. Specific attention is given to how salient participants viewed organizational policies and practices and work unit factors to their success in balancing work and life.

In the final section of the report, **PART V, CLOSING REFLECTIONS**, we draw some preliminary conclusions from our findings and discuss some emerging directions we see for the future.

Based on the findings mentioned above, as well as others explained in more detail in the report following, here are some of our preliminary conclusions:

HIGHLIGHTS of CONCLUSIONS

- Career growth and advancement can be sustained while working on a reduced-load basis in a variety of different career paths in organizations.
- Career satisfaction and fulfillment can be achieved and maintained on reduced load even without formal promotions – through entrepreneurial ventures, change of employers or jobs, or increased challenges and accompanying financial rewards.
- Career growth and advancement is faster and higher for those who return to full-time work.
- Reduced load is an attractive way of working as a sustainable long-term career and life option, not just as a strategy for coping with predictable life events such as the birth of a child or elder care.
- Experienced professionals and managers maintain a strong career orientation and a high level of commitment to their professional identity, regardless of employment status.
- Most people deal with a great deal of change in their lives over time, which often creates difficult challenges and can be traumatic; the more they have flexibility at work and at home, the better they are able to adapt and shift their work and family lives, accordingly.
- Even with a variety of external constraints, organizations continue to facilitate reduced-load work arrangements among professionals and managers, but with varying levels of support; in some contexts, this new way of working has spread and become quite “normal.”

PART I: ABOUT THE STUDY

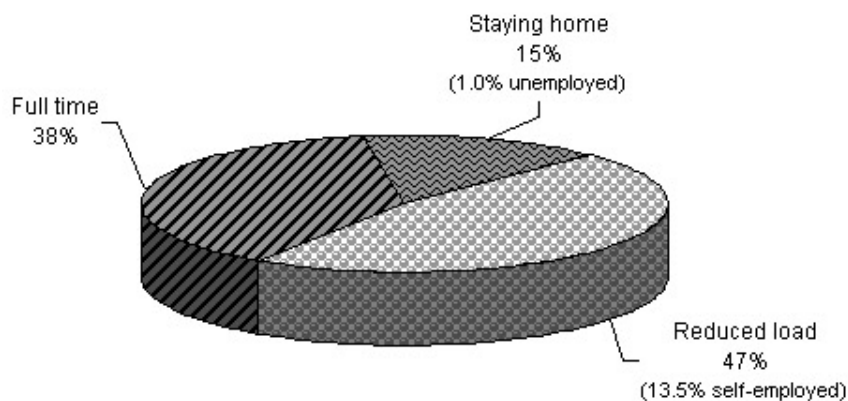
The Research Participants

There were 9 men and 72 women in Study II (compared to 10 men and 77 women in Study I), and their ages ranged from 33 to 58. Of the 81, 38 were still working on a reduced-load basis, 11 of whom were self-employed; 31 had returned to working full-time. Twelve (12) were choosing to stay home for a while: 9 to spend time with their children and invest more in family for a while, 2 to retire, and 1 as a result of being recently laid off. Since Interview I, participants had worked on a reduced-load basis from 0 to 7.4 years, and in total 1 to 19 years.

PARTICIPANT PROFILE

Average age	45
% Female	89
% Married	93
% Canadian	33
% Currently working RL	47
Of those employed in orgs.	
% working in same co.	65
% managers vs. profs.	55
Average years on RL:	
Years since Interview I	4
Total years	8
Average % load for RL	66
Average FTE Salary	\$111,127 (USD)

DISTRIBUTION of PARTICIPANTS



Reduced Load vs. Full Time vs. Staying Home: Demographics

The table below shows that there were a few unexpected differences between those working reduced load, full time, and those staying at home. A significantly higher percentage of those working reduced load, compared with those working full time or those staying home, had elder care responsibilities, family health problems and major personal health problems. Full-timers were significantly more likely to have spouses who experienced a period of unemployment over the 6 years, and they were making significantly higher salaries than their spouse/partners. And finally, those working reduced load were earning equivalent salaries, on average, to those working full time, when the reduced-load salaries were converted to their full-time equivalent (e.g., for someone working 80% and making \$80,000, the full-time equivalent salary would be \$100,000). This suggests that the reduced-load individuals were receiving pay increases comparable to those working on a full-time basis.

Observed differences that were not surprising were the higher salaries (including bonus) of full-timers, and the fact that they experienced more job changes and had worked fewer years on reduced load. They were also working more hours per week (47.4), although not as many as they reported working before first going on reduced load in Interview I (50).

OVERVIEW of STUDY II PARTICIPANTS (2002-2003)			
Demographic Data (average)	Reduced Load	Full Time	Staying Home
Age	44.9	45.2	43.6
Percent married or partnered	95	90	100
Number of children	2.1	2.4	2.8
Age of oldest child	12.2	13.3	9.8
Age of youngest child	7.5	9.4	6.2
Percent during the 6 years with:			
Elder care responsibilities	21	3	8
Family health problems	47	29	50
Major personal health problems	32	13	25
Spouse unemployment	13	26	17
Years on reduced load since Interview I	5.3	2.7	2.9
Total years on reduced load	10	7.1	5.5
No. of job changes since Interview I	2.1	2.6	2.1
Current annual salary (USD)	\$76,722	\$111,725	N/A
Full-time equivalent salary (USD)	\$111,927	\$111,725	N/A
Partner/spouse annual salary	\$122,448	\$93,162	\$145,623
Hours worked per week	29.9	47.4	N/A

Types of Jobs

In Study I, 56% of the sample were managers with responsibility for 3 or more subordinates, and 44% were individual contributors. In Study II 55% of those employed by organizations were managers, and 45% were individual contributors. Sixty-three percent (63%) of the managers were working full time, and 58% of the individual contributors were working reduced load.

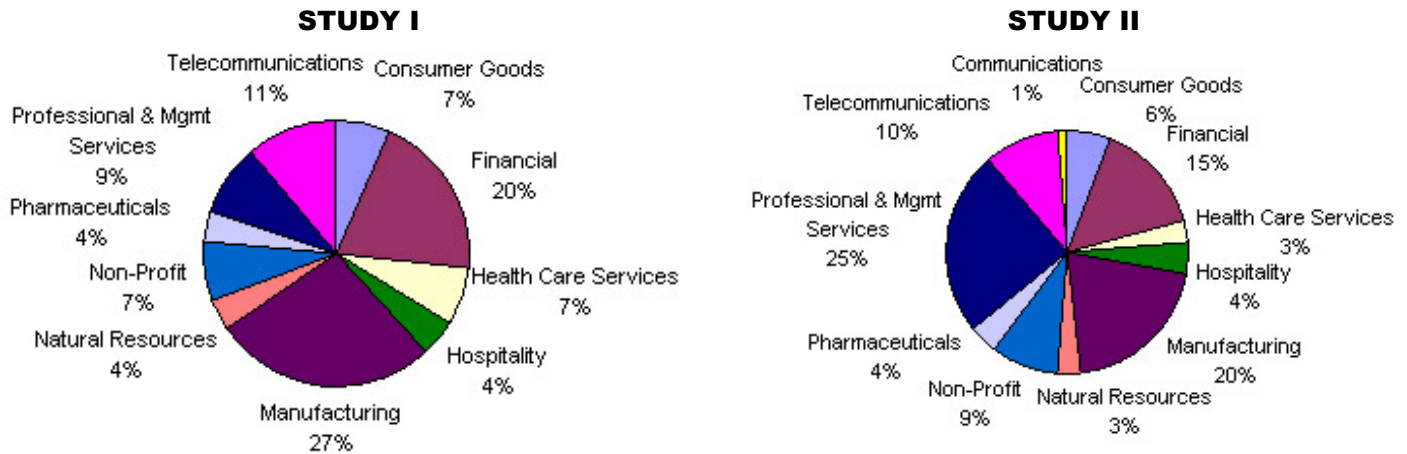
Participants who were employed by organizations, whether full-time or reduced-load, worked in a wide variety of functions, including Finance, Human Resources & Communications, Production & Operations, Sales, Marketing, Research & Development, Project Management, and Information Systems. About 1/4 were in Sales and Client Services and another 1/4 in Human Resources & Communications. Finance, Production & Operations, and Marketing followed as the next most common areas. Those who were managers included those managing a small number of professional staff in support functions as well as line managers in charge of large departments with responsibility for between 75 and 200 people. Samples of various job titles follow.

REDUCED-LOAD POSITIONS	FULL-TIME POSITIONS
Senior Procurement Manager	Assistant Comptroller & Vice President
Systems Engineer	Director, Quality Assurance
Chartered Accountant & Tax Partner	Director, Clinical Trial Materials
Research Scientist	Vice President, Strategic Initiatives
Director, Corporate Branding	Vice President, Specialized Services
Divisional President	Senior VP, Foreign Reporting & Industry Analysis
Director, Planning	Senior VP, Research & Development
Senior Actuary	Project Mgr., Mergers, Acquisitions & Divestitures
Program Manager, Global Sales	Executive Project Management
Vice President & Work Group Manager	Senior Business Director, Marketing
Brand Manager	Venture Principal
Environmental Program Coordinator	Director, Software
District Manager, Customer Info	Upstream Advisor, Corp. Planning & Communications
Director, Learning Resources	General Manager, Learning Services

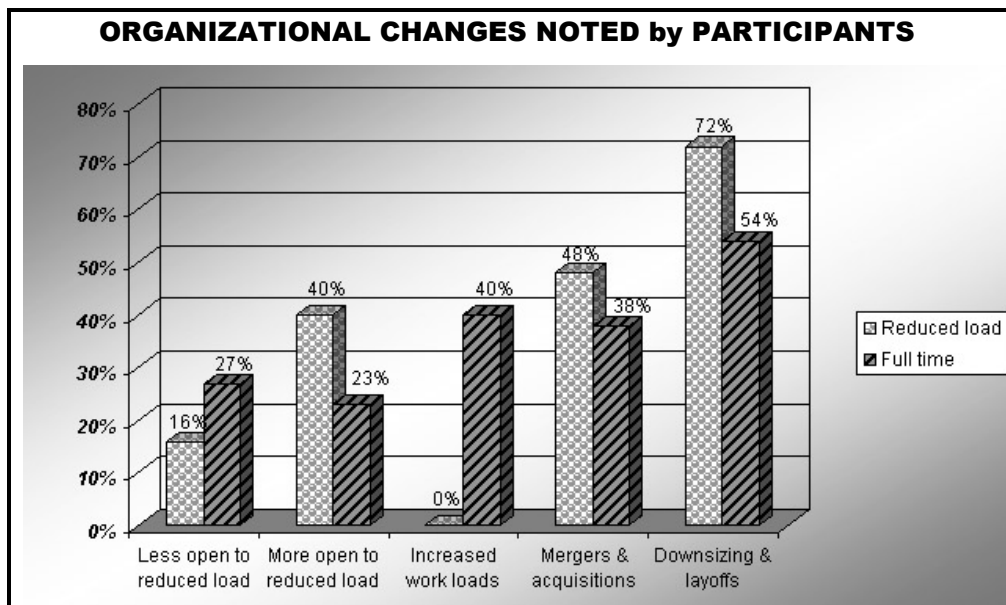
The Employers

Thirty-five (35) of the original 43 companies (83%) were still employing participants in the follow-up study. This is a striking statistic, considering events such as 9/11 and the slow economic growth in the U.S. economy that have occurred since the time of the initial interviews. In addition, employers of the 58 participants who were employed by organizations included 11 new companies. Forty-seven (47) of the 58 were employed by the same organization; this includes cases where another firm acquired their former company, or the firm was a spin-off of the original employer. The other 11 were with new employers. The 69 employed participants, including the 11 self-employed ones, were distributed across sectors in a similar way to the previous study.

INDUSTRY DISTRIBUTION



Participants who were working for the same organization as before were asked to describe organizational-level changes that they had observed over the 6 years. Over 1/2 mentioned downsizing or layoffs, and 2/5 mentioned mergers or acquisitions. It was interesting to note that reduced-load, compared to full-time, employees reported more downsizing and merger/acquisition activity, but also greater openness to reduced-load work in their companies. Forty percent (40%) of the full-timers reported an increase in the amount of work expected by their employers, while those working reduced-load did not mention such a trend in their organizations.



PART II: CAREER & LIFE CHANGES OVER TIME

What Happened Between Interviews I & II

Participants experienced many changes during the period between the two interviews; some were work-related changes and some had to do with family and personal life. Certain changes came about as a result of events totally out of their control, such as a company being acquired or going through downsizing, or an illness in the family. Others were self-initiated, or came about because of a spouse's decision, for example, to change jobs. We focus first on changes and continuities at work, in employment status and types of jobs. Then we describe the range of major life events reported by the entire sample, looking at career, family and personal domains.

Employment Status

Over the 6 years, the entire sample had an average of 2.25 job changes, with the minimum being 0 and the maximum, 10. Most significantly, 2/3 of the sample changed employment status, while 1/3 continued to work on a reduced-load basis with the same employer. Thirty-one (31) participants (38 %) changed from working reduced load to full time; 11, or 13.5% continued to work on a reduced-load basis but became self-employed; and 12, or 15%, were not employed and staying at home.

Rationale for Changes and Continuities in Employment Status

Those working reduced load at the time of the 2nd interview included 27 working for the same employer as before and 11 who were self-employed, or 38 participants in all, 47% of the sample. For over 1/2, the reasons for continuing to work less than full time had to do with their high commitment to family and the need or desire to spend time with their children. About 1/3 of this group explained that this choice had to do with their being able to continue to learn and develop in their careers and maintain their professional identity while also allocating the time they wanted to personal and family pursuits. About 1/3 also described the challenge of a child with serious health or learning problems which required significant parental investment of time and energy.

WHY DID SOME STAY "REDUCED LOAD"?

- **High commitment to family (50%)**
- **Continued learning & career development (33%)**
- **Child with serious health or learning issues (33%)**

Note: Some respondents gave more than one reason.

Of the 11 self-employed reduced-load employees, 3 had left their employers because the reduced-load work arrangement was not working well, and they did not want to work full-time. Six (6) were laid off and/or arranged severance packages at a time when there was a major reorganization, downsizing, or merger activity. The other 2 chose to leave their employer to start their own businesses. At the time of the 2nd interview, 5 of the 11 were running their own companies and were very happy with their self-employment status. Six (6) were working as independent contractors but expressed that their preference would be to return to work in a large corporation if they could do it on a reduced-load basis.

For those who were working full-time, 3 main factors explained the shift: career advancement opportunities, family income needs, and inequity in their previous reduced-load arrangements. Thirteen (13) of the 31 had

promotion or job opportunities that were very appealing but required that they work full-time. These individuals also spoke of their high-level career aspirations and the strong desire to move ahead, or to have an impact. Ten (10) participants decided to shift to full time primarily for financial reasons, most commonly because a spouse/partner had lost his or her job or had experienced a decline in earnings. Twenty-one (21) of the 31 full-timers were the primary breadwinners in the family, including 3 single parents. Finally, there were 8 participants who switched to full time because for quite a while they had actually been working full-time hours, but were earning reduced pay. They took advantage of opportunities that arose to correct the situation, which involved going back to official full-time work, but without adding responsibilities or tasks.

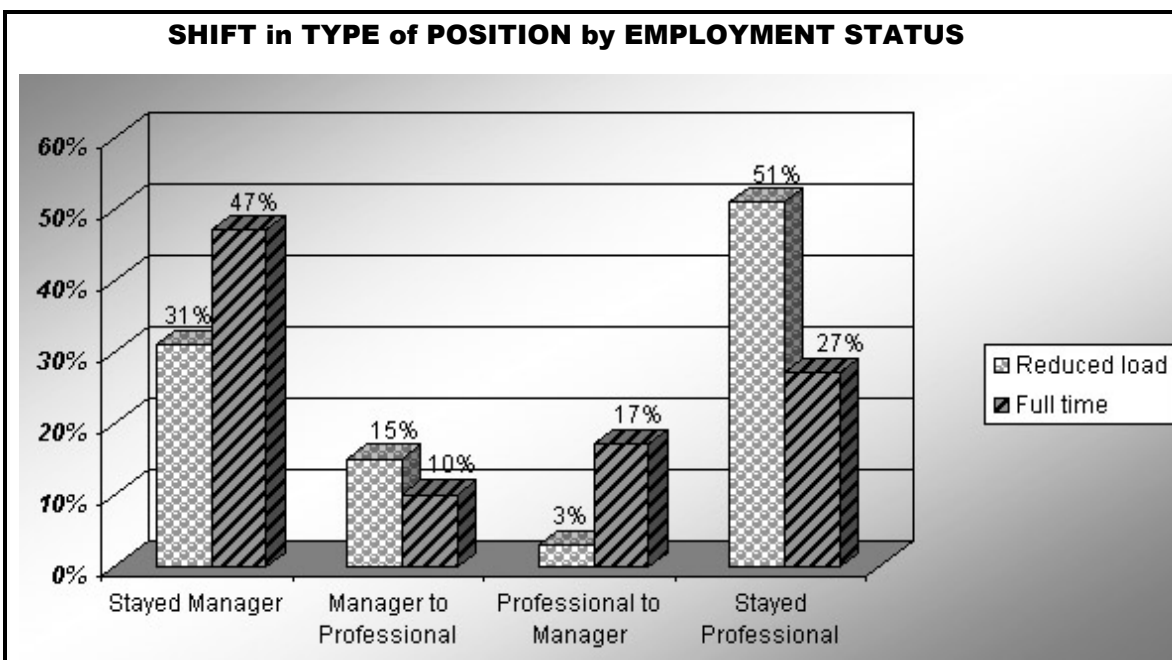
WHY DID SOME GO BACK TO "FULL TIME"?

- Opportunity for career advancement (42%)
- Family income needs (32%)
- Inequity in reduced-load arrangement (26%)

Of the 12 individuals currently not employed, 1 had been laid off recently and was actively looking for a job, and 2 were retired. Of the remaining 9, 6 had 3 or more children, at least 1 of which was born in the 6 years since the previous interview. They had chosen to stay home for a while at least partly to be able to spend more time with their children. Three (3) of the 6 had also given up their jobs when the family relocated due to a spouse's promotion and relocation. In the remaining 3 cases, 2 had decided to resign due to difficulties maintaining a reasonable work load and lack of support from a boss; the 3rd was laid off as part of a merger and reorganization.

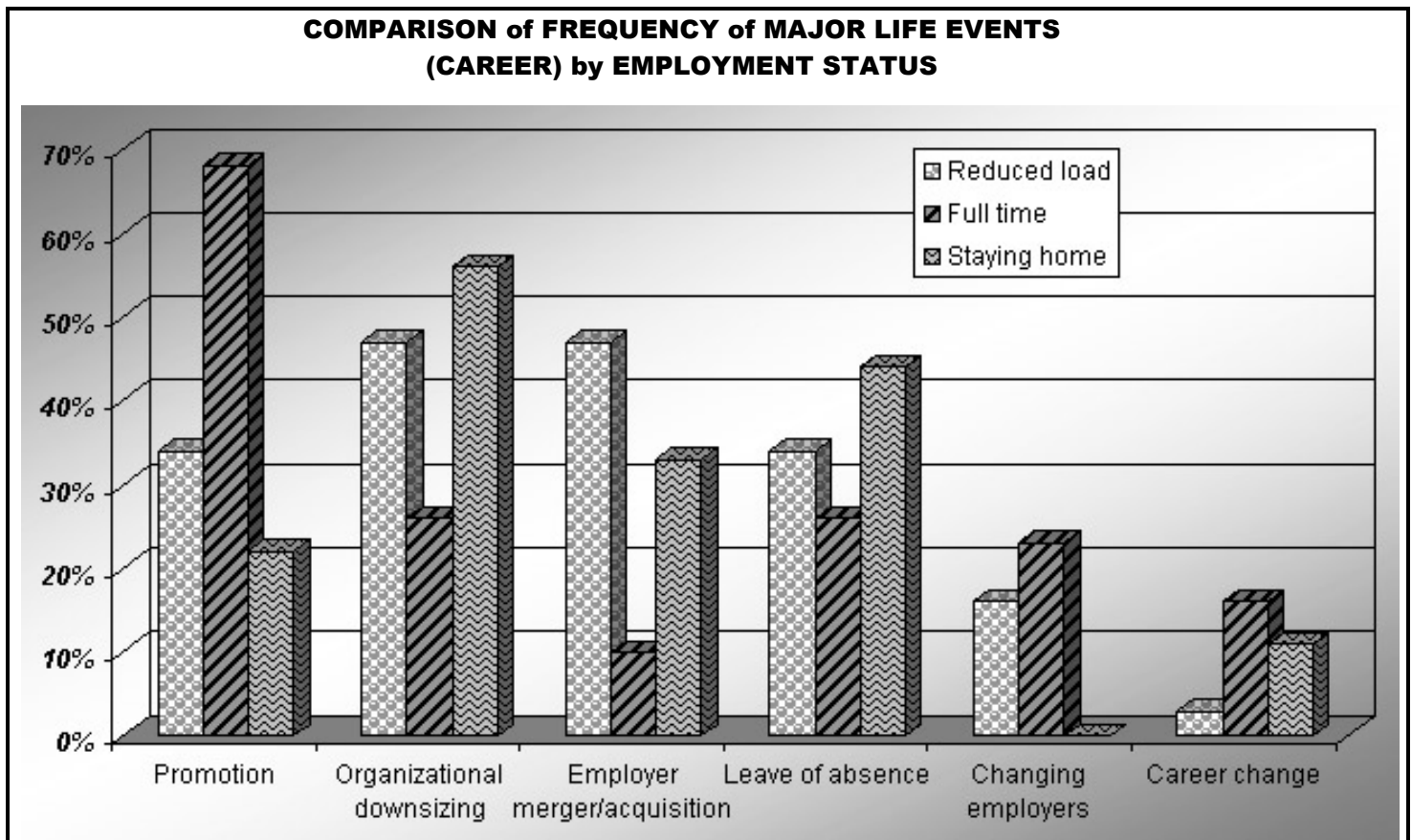
Managers vs. Professionals

We can see in the figure below the shifts between types of positions among full-timers and reduced-load employees. Most commonly, the full-time managers stayed managers, and the reduced-load professionals stayed individual contributors. However, about 1/3 of reduced-load managers were able to maintain their managerial status, and close to 1/5 of those who were currently full-time managers had previously been reduced-load professionals.



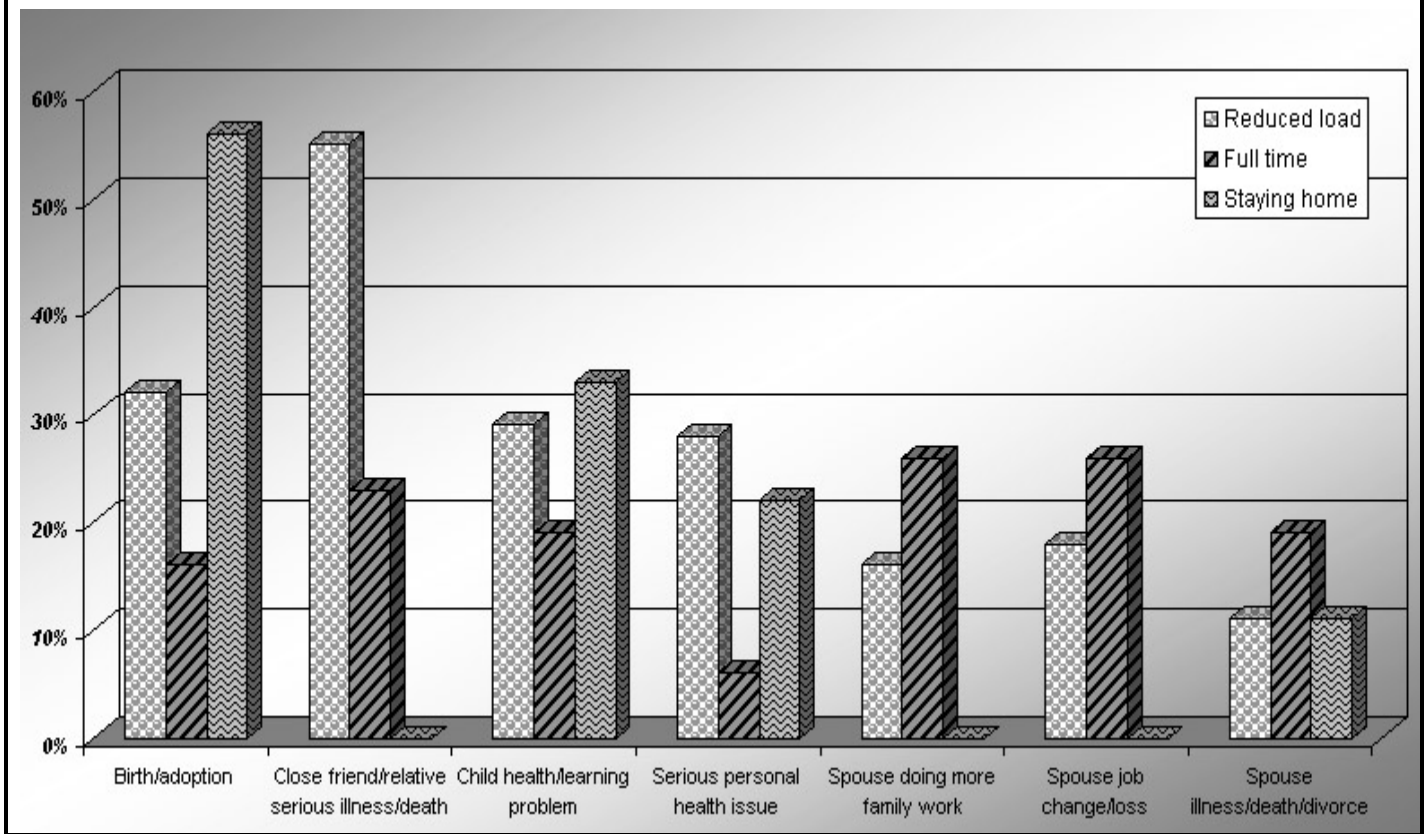
Major Life Events

Participants in the study reported a wide variety of major life events in the 6 years between the 1st and 2nd interviews, many of which prompted changes in work or life patterns and routines. Many of the life events described had to do with the workplace or career, but family and personal events were also frequently reported. Two (2) of the most traumatic events were the serious illness or death of a spouse and the life-threatening illness of a child. More positive events included marriage, birth or adoption of a child, and receiving a promotion. The 2 charts below show the events that occurred most often, the first focusing on career and the second focusing on family and personal life.



As shown above, it is striking that full-timers mentioned less turbulence in their organizations, as well as significantly more promotions and changes in careers and employers. At the same time, the chart below shows that full-timers reported more upheavals and changes with their spouses. Participants on reduced load and staying home cited more events involving their own health problems, as well as those of close friends, relatives, and children. At the same time, these two groups also experienced more births or adoptions over the 6 years between the two interviews. A major life event common across all 3 groups was taking a leave of absence from work; 25 participants, or 30% of the total sample, reported doing this.

**COMPARISON of FREQUENCY of MAJOR LIFE EVENTS
(FAMILY & PERSONAL) by EMPLOYMENT STATUS**

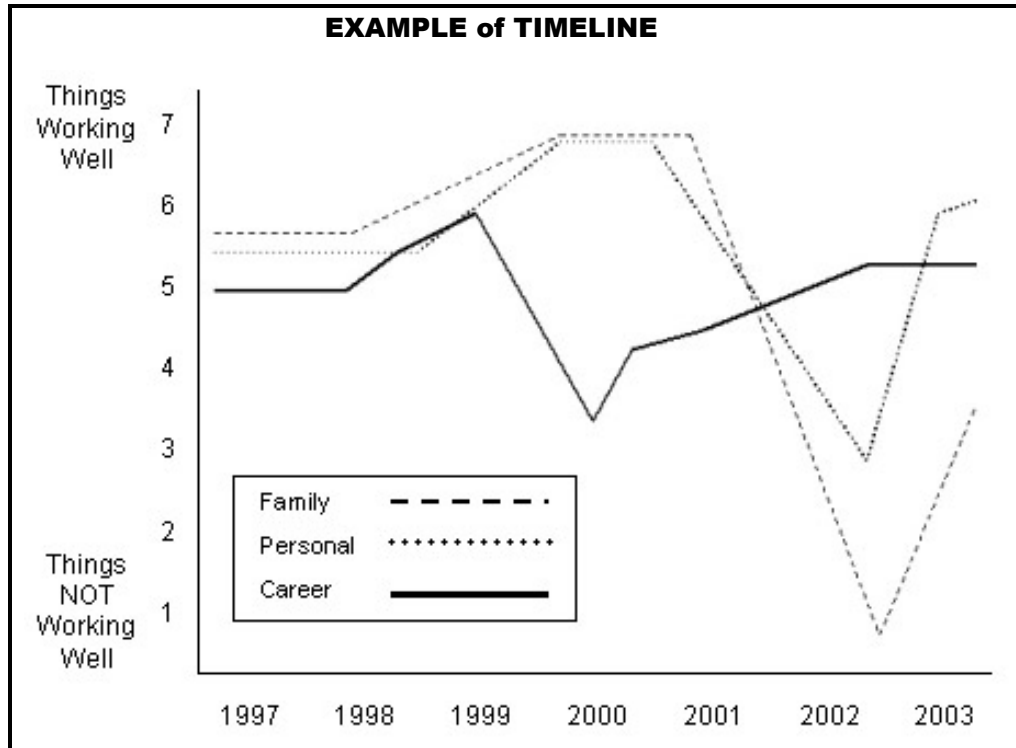


Peak Experiences

When we asked participants to describe any peak experiences they could recall over the past 6 years, the responses of both reduced-load employees and full-timers were most often about a career achievement. Forty-seven percent (47%) of the reduced-load participants, and 42% of the full-timers described an event such as meeting with success in an extremely challenging situation at work, receiving an award, meeting with financial success in the first year of starting a new business, or completing an MBA. Thus, it is interesting to note that reduced-load participants mentioned memorable peak experiences involving the workplace to the same extent, more or less, as full timers. The next most often cited moments had to do with an especially memorable event related to a child or husband or family well-being in general. Some examples included a child’s birth, a Bar-Mitzvah, a child’s heartfelt expression of appreciation, getting married, a fantastic family vacation. Thirty-two percent (32%) of the full-timers mentioned such an occasion, as did 45% of the reduced-load employees.

Career, Family, & Personal Timelines

In addition to listening to participants' narratives about significant life events and changes, we asked them to complete a Timeline Exercise on 3 dimensions (career, family, personal) covering the time from the 1st interview to the 2nd. Sixty-eight (68) of the 81 either drew or dictated their responses. The horizontal axis was time, and the vertical axis was how well things were working. The sample below shows the timelines of one participant.



A few participants described the intervening years as rather stable, with their career, family and personal lives remaining on an even keel. Some experienced more of a roller-coaster ride with clear peaks and valleys in some aspects of their lives. Yet others described steadily improving or deteriorating circumstances. It was more common to hear reports of serious crises and recovery than it was to hear about a steady state of calm with things going pretty well continuously over the 6 years in all 3 arenas – career, family, and personal life. In fact, 19 of the 81 participants (23%) had at least 2 of their 3 lines dipping into 2 or more “valleys,” or points where things were not going well. Only 6 participants had 2 or all 3 of their lines remain fairly level over the 6 years.

The family and personal timelines tended to co-vary over time, whereas the career timeline was quite independent of the other two. The contours of the lines drawn fit roughly into one of the following 5 broad categories: 1 peak and valley, 2 or more peaks and valleys, an even keel, steadily going up or steadily going down.

Another way we systematically compared participants' experiences over time was to estimate the overall magnitude of change they experienced over the 6 years. Forty (40) of the 81 participants were rated as having experienced a high degree of change, 2.5 or 3 on a scale of 1 to 3; only 8 were rated at a 1, as having experienced little or no change. Participants experienced less stability and more steadily declining circumstances in their careers than in their family and personal lives over time, but there was a great deal of variation in general in how things evolved.

PART III: OUTCOMES

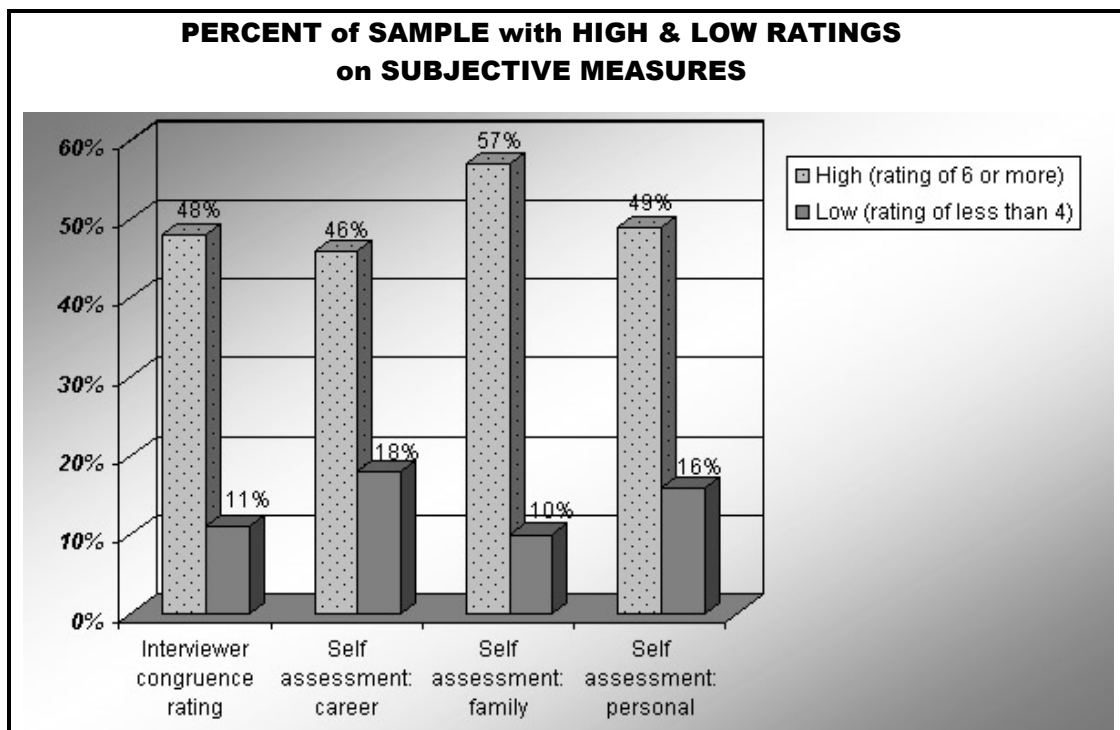
How Did It All Turn Out?

We were interested in learning how well things were working out for participants in all aspects of their lives, from a subjective point of view, according to their own personal goals. As well, we wanted to assess their career success using conventional objective measures like upward mobility and salary increases. And lastly, we wanted to probe what kinds of factors might distinguish between those cases where things were working out very well versus not so well for them personally, for their careers, and for their families.

Total Sample – Objective & Subjective Measures

In spite of all of the difficulties, unexpected challenges and changes faced by participants, the majority were doing well, both as assessed by objective and subjective measures. In terms of objective measures, employed participants as a whole had an average rate of increase in full-time equivalent salary of 38% over 6 years. They had received 76 promotions in all, with 35 receiving 1 or more.

Subjective measures from Interviewer and self-assessment ratings were also quite positive. The Interviewers rated participants on the basis of how well the participant's current life was congruent with what he or she wanted at that particular point in time, on a scale of 1 to 7, with 7 indicating the greatest congruence or consistency. Overall, the average rating was 5.3, with a minimum of 2 and a maximum of 7. As shown below, half of the sample received a rating greater than 6, and only 11% received a rating less than 4. Self-assessment ratings were taken from participants' Timeline drawings explained above. The point where each line (career, family, and personal) ended at the time of the 2nd interview was interpreted as the individual's assessment of how things were going, on a scale of 0 to 7. Close to 50% of the sample in each of the three domains indicated things were going very well (> 6), and less than 20% of the sample in each of the domains indicated things were not going well (<4).



Comparison of Outcomes by Employment Status

When we compared participant outcomes according to whether they were working reduced load, full time, or staying home, we found surprisingly few interesting differences across the groups. Full-timers were making higher salaries, had received more promotions, and had experienced a higher rate of salary increase over time, but that was to be expected. However, when salaries were adjusted for percent reduced load, those working reduced load and full time were earning the same amount. As far as how content participants were with their lives, the Interviewer congruence rating did show that reduced-load participants seemed to be living lives most consistent with their ideal; but the differences between the groups were not significant. Furthermore, participant self-assessment ratings of how things were going in their careers, families, and personal lives indicated no pattern of one group being better or worse off overall than another. The one noticeably lower rating, which was the stay-at-home group's assessment of how things were going in their careers, was predictable.

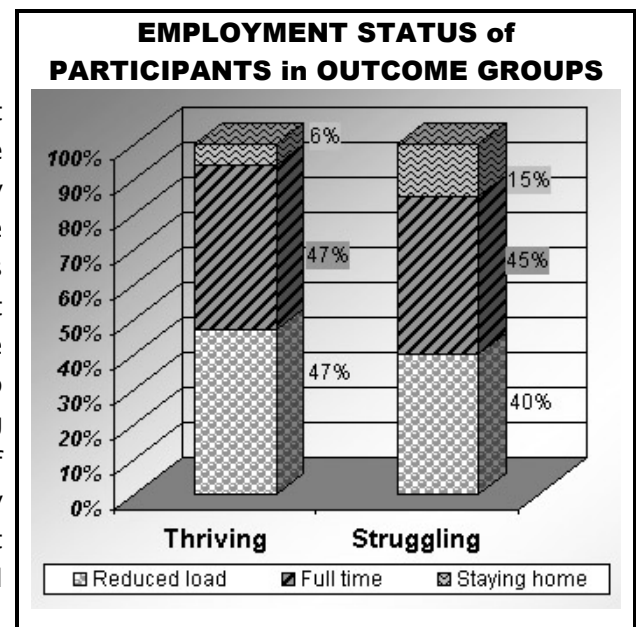
SUBJECTIVE & OBJECTIVE MEASURES	REDUCED LOAD	FULL TIME	STAYING HOME
Salary (in USD)	\$76,722	\$111,725	N/A
Full-Time Equivalent Salary	\$111,927	\$111,725	N/A
FTE Salary Increase 1997-2003	30%	47%	N/A
Number of Promotions in 6 years	0.5	1.1	0.2
Interviewer Congruence Rating	5.5	5.2	4.7
Career Self-Assessment 2003	5.1	5.4	3.4
Family Self-Assessment 2003	5.5	5.3	5.5
Personal Self-Assessment 2003	5.2	5.1	4.9

Another way of comparing the reduced-load and full-time participants is to examine the cases where participants assessed things as going very well on all three dimensions (career, family, personal) and to see if there was a concentration of those in a certain employment status. Of 16 participants who reported things as going well (between 6 and 7 on the scale) on all 3 dimensions, 8 were working full-time, 7 were on reduced load, and 1 was staying home, which approximates the percentages of the 3 groups in the overall sample.

Thriving vs. Struggling

Next for our analysis we created two groups in order to gain insight into why some participants were doing better than others. The "Thriving" group included participants assessed as doing well by both themselves and the Interviewers; the "Struggling" group were those assessed as not doing so well, again by themselves as well as by the Interviewers. We hoped to be able to identify factors that distinguished the 2 groups and might help us understand the dynamics between different outcomes. Those in the Thriving group met the following 2 criteria: 1) they self-assessed things as "working well" (greater than or equal to 6 on a scale of 0-7) on at least 2 of the 3 timeline dimensions (career, family or personal); and 2) they were assessed by the Interviewer as living a life congruent with what they wanted at the time of the 2nd interview (greater than or equal to 6 on a scale of 1-7 with 7 being most congruent). Those in the

Struggling group met the following criteria: 1) they self-assessed things as "not working well" (less than or equal to 4 on a scale of 0-7) on at least 2 of the 3 timeline dimensions in 2003; and 2) they were assessed by the Interviewer as living a life less congruent with their desires (less than or equal to 5 on a scale of 1 to 7). Reduced-

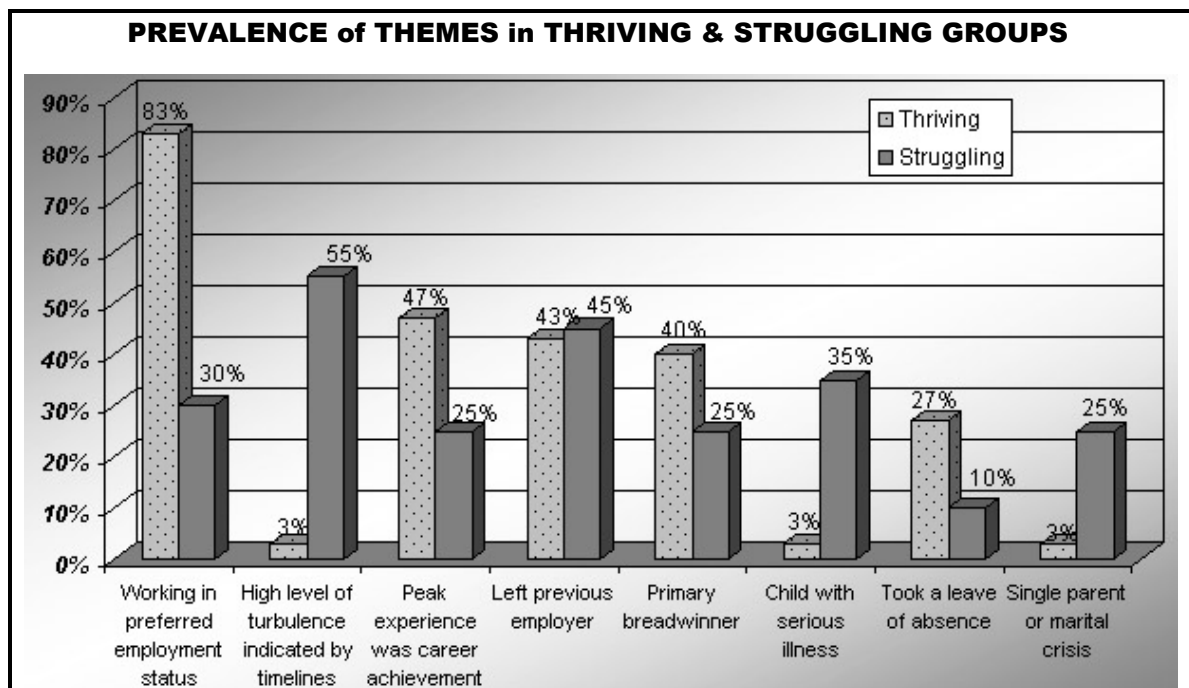


load participants made up 47% of the Thriving group and 40% of the Struggling group. Full-timers were also 47% of the Thriving group and 45% of the Struggling group. Stay at home participants were 6% of those Thriving and 15% of those Struggling. Thus, for those who were employed, working reduced load versus full time was not a critical factor by itself in how well things were working out overall.

We looked at similarities and differences in the 2 groups on a number of variables. Magnitude of change in the 6 years since the 1st interview, and partner salary, were the only variables that showed significant differences. Those who had greater change and higher partner salaries were more likely to be struggling. Those with more children and younger children were also more likely to be struggling. The partner salary finding is interesting, as it suggests that higher income did not necessarily make things easier for the individuals in our sample. The high salaries are likely related either to partners having more demanding jobs, or being the primary breadwinner in the family.

SIMILARITIES & DIFFERENCES ACROSS GROUPS		
Demographic Data (Average)	Thriving	Struggling
Age	44.5	43.7
Number of children	2	2.5
Age of youngest child	7.9	6.9
Age of oldest child	12.5	10.7
Hours working/week	36	38
Salary	\$96,398	\$73,972
Full-time equivalent salary	\$120,345	\$85,637
Partner salary	\$88,578	\$120,909
Number of years on reduced load		
Since Interview I	4	4.2
Overall	8.4	8.6
Number of promotions	0.5	0.8
Magnitude of change	2.2	2.7
Number of job changes	2.1	2.9
Years in current job	3.5	2.9

Some other distinguishing patterns that emerged in the qualitative analysis are shown in the following chart. Most notably, a very high percentage of those who were in the Thriving group were working in their preferred status, while those in the Struggling group were not. Consistent with magnitude of change findings, the Struggling group also had a higher level of turbulence recorded in their Timeline drawings. Not surprisingly, 35% of those in the Struggling group, compared to 3% in the Thriving group, had children who had experienced serious illnesses over the 6 years. As these trends suggest, it is likely that a multitude of factors contribute and interact to determine how well things go for any individual over time.



Meaning of Career Success

At the time of the 1st interviews, 6 different themes were identified in respondents' descriptions of what they wanted from their careers, or what career success meant to them; these were also found in responses to questions about the meaning of career success and future career goals in Interview II. At the time of Interview I, being able to "have a life" was clearly the most predominant theme in respondents' comments about the meaning of career success. At the time of Interview II, this theme was much less common, although it was found in almost half of the full-timers' comments. The other main theme in Interview I was "learning, growing, being challenged," which was also not as important among participants in Interview II. The 2 predominant themes in Interview II were "having an impact" and "peer respect/recognition." Perhaps these changes in the meaning of career success to participants are partly a function of life stage and career stage; the total sample had worked on a reduced-load basis for a total of 8 years, as opposed to 4 at the time of Interview I. Presumably they had been somewhat successful at being able to "have a life" while continuing a career, and therefore were less likely to mention this aspect of career success. The 2 predominant themes in Interview I reflect more personal, subjective criteria (having a life, and learning and growing); whereas the 2 most frequently mentioned aspects of career success in Interview II reflect a more external orientation (having an impact and peer respect). In the current study, participants spoke of higher aims with less focus on themselves, including not mentioning very often "upward mobility" as an important aspect of career success.

The percentage of participants who mentioned the various themes are shown below. Please note that many participants mentioned more than one aspect of career success, so the percentages do not add up to 100%.

PARTICIPANT VIEWS: MEANING of CAREER SUCCESS in INTERVIEWS I & II					
	INTERVIEW I	INTERVIEW II			
	Total Sample	Total Sample	Reduced Load	Full Time	Staying Home
Able to have a life	72%	32%	30%	48%	0%
Learning, growing & being challenged	61%	37%	39%	42%	8%
Upward mobility	46%	20%	16%	26%	17%
Having an impact / making a contribution	44%	54%	45%	71%	42%
Peer respect / recognition	38%	52%	58%	58%	17%
Interesting / enjoyable work / having fun	13%	35%	29%	45%	25%

PART IV: CRAFTING LIVES THAT WORK

In exploring what kinds of factors helped participants to establish and maintain the patterns of work and life that they wanted, we found that they spoke primarily about their own strategies of creating or maintaining leverage to maneuver and adapt their work loads both at work and at home as circumstances changed over time. However, they also talked about the role that bosses or work groups played, and they gave their impressions of their employer's current posture toward reduced-load work arrangements and whether they thought it had changed since the 1st interview.

Finding or Creating the Right Job

One of the most frequently mentioned approaches to finding the balance they wanted in their lives involved changing jobs, employers, even careers, or starting their own businesses. Participants put a great deal of emphasis on the importance of finding or creating the right job that would allow them to lead the lives they wanted to lead. The goal was to gain more control over work load and time demands, as well as to achieve greater satisfaction and the capacity to make a meaningful contribution. A few people mentioned turning down promotion offers, or “self-plateauing” in their careers, as a way to maintain balance. A related strategy involved crafting one's job, whether reduced-load or full-time, very carefully and creatively around the desired load, and at the same time managing others' expectations. For example, some accountants on reduced load talked about the importance of limiting the number of clients to be served; yet they mentioned how strategically important it was from a career point of view to be sure to have some key clients. Participants, both full-time and reduced-load, described the importance of managing their own work loads and time, while simultaneously keeping an eye on doing what was best for the company, in terms of continuous improvement and work unit efficiency. In fact, in order to anticipate and prevent collisions between what was best for them and what was best for the company, they shared that they did a great deal of “forward planning.” This included taking a very disciplined approach to work and maintaining boundaries ruthlessly, at times. But it also required being flexible at critical moments by responding to work unit demands for on-site presence, even on official “off” days. Several mentioned the importance of using delegation of work strategically, not only to off-load tasks but to utilize and develop the next generation of talent.

Informal Customizing of Job

In addition to choosing or crafting their jobs carefully, participants also described more subtle strategies that involved creatively fine-tuning or re-calibrating their jobs to suit them. For example, one full-time executive simply announced she would be working mostly from her “office” at the cottage for the month of August. Others scheduled family routines (like picking up a child at day-care) requiring that they leave the office at a certain time 2 or 3 days a week. Some kept private their decisions to simply limit the number of hours they worked per week. Staying home to work a few times a month gave one person what she needed to catch up and not feel overwhelmed. Another informal customization of a job involved an individual who worked reduced load 3 days a week during the school year, but found that in the summer it suited her better to work 1 week full time and then have 1 week off, since it was easier to find summer day care programs for her child in one-week blocks of time. Certain full-time participants negotiated unofficial and temporary reduced-load arrangements for phasing back to work after the birth of a child, or to help them manage the unexpected “crunches” that arose as a result of a family illness or other crises. These were ad hoc and very personal approaches to maintaining the kinds of lives desired.

Building Relationships

Another common theme in participants' descriptions of strategies and approaches they used to "craft lives that work" was developing and utilizing relationships and alliances with senior managers in the organization. Many discussed educating and socializing their bosses around reduced-load work arrangements and emphasized the value of building good relationships over time with people in leadership positions, through achieving high performance and a reputation for delivering results. In order to protect or find new reduced-load positions when there were reorganizations or they were re-assigned to new managers, numerous participants reported having to fight and take a proactive, even tough, stance. Others mentioned how supportive of their situation their bosses were, ensuring that the reduced-load arrangement was viewed fairly in terms of work load, as well as by peers and clients.

Adjusting the Work Load at Home

A 4th theme across both reduced-load and full-time participants was renegotiation of the division of labor in the family to reduce their work load in that domain. Among the full-timers, about 1/4 had spouses who had lost their jobs or who chose to quit to assume the role of primary care-giver and home manager. In some cases, this was a temporary arrangement; in others, the couple decided that reversing roles at home suited them. A few invested in more hired help, such as a live-in au pair; others engaged relatives or neighbors to help them keep family life on an even keel and to respond appropriately to children's changing needs over time.

Taking Time Out

A final individual strategy reported was that of taking a leave of absence from work; both reduced-load and full-time participants mentioned the importance of these periods of withdrawal from their normal work routines. Some employers actually had a policy of allowing "stress leave" for specific situations. A few participants negotiated leaves in order to work for a charitable organization for a period of time; others strategically arranged for some time off between jobs when changing employers or shifting to self-employment.

Work Unit & Boss Factors

In the 1st study, manager support was a very important factor in the success of virtually all of the reduced-load work arrangements studied. Interestingly, it did not play such a central role in the follow-up study. Of the 29 reduced-load participants working in organizations, 23 attributed their success primarily to their own individual strategies and approaches to their work situations. Four (4) indicated that their managers were most critical to their being able to sustain their ways of managing work and life, and 2 maintained that organizational policies and practices made the most difference. However, 21 of the 29 indicated that their bosses did play an important support role in their reduced-load arrangements. Seventeen (17) of the 29 gave substantial credit to organizational policies and practices when it came to their success in working reduced load.

Organizational Policies

In examining participants' observations about changes in organizational commitment to reduced-load work arrangements, we found that 17 organizations were viewed as having either maintained or increased their level of support, while 14 were reported to have decreased their support. In an additional 3 companies, participants had conflicting views; we did not classify these either way. Of the 17 companies who had maintained or improved their support of reduced-load work, 3 had been through a merger or acquisition process which positively influenced the overall culture and formal practices. Meanwhile, 7, or 1/2 of the 14 organizations where things had deteriorated, were perceived as having less progressive policies or practices directly as a result of their former employer being acquired by another firm.

PART V: CLOSING REFLECTIONS

Overall, this report indicates that there are a variety of ways of working and living, of adapting work patterns over time, both at the office and at home, in such a way that life is rewarding and fulfilling.

Working on a reduced-load basis can be a long-term successful strategy for achieving career success while also maintaining personal and family life priorities.

Employment status by itself is not a good predictor of attitudes or outcomes. In fact, in terms of different job levels and functions, and career goals and accomplishments, the variation among those working reduced load, as well as those working full time was so striking that we cannot stereotype those in either group as fitting into a single mold. Some of those on reduced load were still aiming for the top, or were already at the very highest level within their organizations. Others viewed themselves as solid and valuable contributors and looked forward to many more years of the same. Although certain participants working less than full time experienced slow advancement, others had won awards or promotions. Likewise, some full-timers had amassed a record of impressive achievements or were on a path to the summit of the organization. Indeed, 42% had given up working on a reduced-load basis in order to accept a desired promotion. Meanwhile, others were content to do work that was continually challenging and satisfying yet also allowed them to keep a reasonable pace in their lives.

Working less than full-time for a significant period of time need not seriously damage an individual's potential to advance. The majority of individuals working reduced load at the time of the 2nd interview had progressed professionally, were pleased with their growth and development, or expressed a high level of satisfaction with their careers. Based on their own accomplishments or on feedback from performance reviews or steady pay increases, most viewed themselves as at least above-average performers who were highly valued by their employers or clients. Furthermore, nearly 30% of those working reduced load continuously since the 1st interview were managers supervising others; 60% of those who were now full time but had previously been reduced load were managers. These data clearly suggest that organizations do not necessarily view a professional's reduced-load experience as a barrier to serving in leadership positions. Our findings suggest that reduced-load work is a viable, sustainable, long-term career option. While it may slow an individual's progress, and in some situations postpone advancement to certain levels until or unless they are willing to return to full-time, individuals indicated that they felt able to make important contributions to their companies and their families, while also maintaining a long-term commitment to the labor market and achieving career success. In our study, most of those working reduced-load arrangements viewed themselves as successful in their careers.

Individuals' choices of how and where they work and on what basis (reduced-load or full-time) are complex, continually changing, and determined by multiple factors often beyond their control.

We found that many factors seemed to influence participants' lives, for example, organizational circumstances (including mergers and acquisitions, reorganizations, etc.), spouse employment changes, personal health, children's health and learning issues, and health of close friends and relatives. Furthermore, when we looked at those who were staying at home or working reduced load, we found that they gave many reasons for their choices besides wanting to spend more time with their children. For example, several were staying at home because the family relocated for a spouse's promotion, and they experienced difficulty finding a reduced-load position in the new city. Others pursued particular work arrangements simply because they were available. For example, a software engineer who had planned to quit her job after maternity leave for her 4th child, learned that she could continue working on a 20% basis (8 hours per week); she chose this option until the youngest goes to school, whereupon she plans to gradually increase her hours to 50% or more. Others spoke of ideal reduced-load positions they had where they were continually being challenged, learning and developing; they didn't want to return to a full-time status where the work might not be as stimulating and satisfying. Among those working full-time, quite a few had made the switch to maintain a reasonable family income when a spouse's work status changed. For some, this was viewed as a temporary accommodation; for others, it evolved that the spouse took charge of the family responsibilities, enjoyed the new role and didn't plan to return to full-time employment for the foreseeable future. One thing was very clear: most people encounter a great deal of change in their lives over time, which often creates difficult challenges. The more flexibility they have to respond creatively to these changes and challenges, given their particular resources and demands, the better able they are to adapt and shape their work and family lives accordingly.

Today's professionals and managers are highly talented and motivated individuals who expect to combine a meaningful personal and family life with career success; organizations who want to attract and keep these employees need to be aware of this and respond by offering more career path options with shifting levels of contribution over time.

One of the constants across all participants regardless of employment status was a high level of commitment to their professional identity and a strong career orientation. And yet, regrettably, many who preferred to work on a reduced-load basis were not able to do so because of the lack of opportunities available to them or because of the absence of real support for those arrangements, if in fact they materialized or were created. This study demonstrates the extensive variety of options possible and the fact that different ways of working continue to evolve over time as organizations and individuals learn. To demonstrate this point, notice that 42% of the Thriving group were primary breadwinners in their families; at the same time, 30% of them took a leave of absence of 3 months or more during the 6-year time frame. The evidence presented here informs us that there is no one best way to achieve personal, career and family "success." Organizations can do more to reflect and accommodate the career and life pattern changes currently happening in our society.

Organizations are changing to provide greater access to new ways of working for a changing workforce, but some are more enthusiastic and committed than others; more innovation and follow-through is needed.

Some participants disclosed that their organizations had maintained policies on reduced-load work “on paper,” but that there was much less actual utilization of different ways of working because of the waves of downsizing and reorganization. On the contrary, others who had been able to maintain their reduced-load status reported even more frequently than full-time participants that their employers had laid off employees and been through difficult times financially. Clearly, some organizations have found the means to continue with a commitment to new ways of working even in periods of restraint, and in some instances have even fashioned it into a win-win situation for both the organization and the individual. At the same time, others have used hard economic times as a justification to pull back or put on hold experimentation with different ways of working.

One sign which could imply a shift in organizational culture is that participants in Study II reported less reliance on their “bosses” to find or continue reduced-load positions. This is most likely a result of there being less resistance in general within the organization; perhaps there is less of a need for champions. As well, a number of participants reported becoming managers and supervising reduced-load professionals in their own work groups. Now it was their turn to put into practice for others, to pass on to the next generation, ways of working that they had pioneered, that had helped them, that were no longer so controversial.

There were also many organizations where participants reported an openness to reduced-load work in contexts where it had previously been rejected. For example, in the late 90’s we heard that women might be able to “get away with” reduced-load work in certain circumstances, but in no way would it be acceptable for men. Yet there is a small cohort of men in our sample for whom working reduced load is the preferred career choice over time; further, a number of participants spoke of male professionals currently working on this basis in their organizations, where before there had been none. As well, there were certain functional areas, such as sales, where reduced-load work was formerly seen as not viable. Yet we heard that currently there was some experimentation with allowing reduced load through job sharing in the sales area. One widely perceived obstacle still present in most organizations is the assumption that a professional can be promoted only “so high” while still working less than full time. However, we learned that participants in several companies believe that even this caveat will eventually be put to rest, as organizational leaders see more examples of employees succeeding at levels no one thought possible in the past.

APPENDIX: METHODOLOGICAL NOTES

Data for Study II were gathered between November 2002 and November 2003 by a team of 5 researchers; 4 professors (1 from a university in Canada and 3 from universities in the U.S.) and an independent Ph.D. consultant based in Connecticut. Two (2) of these 5 researchers also conducted interviews in Study I carried out 1996–1998.

All 87 participants in the original study were contacted and asked if they would be willing to be interviewed. Four (4) did not respond to our calls or e-mails. Two (2) responded and agreed to be interviewed, but cancelled scheduled interviews several times, and ultimately did not return subsequent calls. These 6 individuals were from 4 different companies, and 1 of them was the sole participant from her company in the previous study; therefore, we lost only 1 firm from non-respondents in our 2002–2003 sample. There were 6 other firms of the 43 from the 1st study not represented in the 2nd, because participants had left those employers for other positions or to stay home for awhile; 2 other firms in the original study merged into 1 firm. A total of 35 of the original 43 firms still employed our participants, either in their original form, or in new merged entities or spin-off companies.

All participants were assured that their anonymity would be preserved in all reports of findings and that they would receive a copy of a summary of findings from the study. Interviews were conducted by telephone and lasted from 1.5 to 2 hours. They were semi-structured and covered the following topics:

- Current situation – work, personal, family;
- Changes and continuities over time, including job changes and career advancement;
- Major life events and peak experiences;
- Perceived outcomes – career, family, personal;
- Future plans/goals;
- Meaning of career success;
- Perceptions of organizational changes;
- Observations about effective managers they have had while working reduced load; and
- Strategies/approaches used to combine career and family or personal life effectively.

The interviews were audio-recorded and transcribed *verbatim* for analysis. Data analyses were mostly qualitative. Rather than quantifying respondents' answers, qualitative methods analyze the actual content – what people say and how they say it. Most analyses used one of two techniques: a modified form of “axial coding,” where interviewers extract all the material applying to the key themes listed above; and “grounded theory,” where new themes are identified while reading transcripts. Qualitative methods are particularly useful for understanding a phenomenon in depth; they are not typically used as the basis for generalizing findings across large populations. Readers must be cautious in their interpretation, remembering that the sample was small and unique in a number of ways. These limiting factors would include that the individuals studied were in unusually high-level and well-compensated positions, and that the employers were quite large and thus not representative of the entire North American economy.