# Report from the

# Chancellor's Study Group
# on
# Work/Life Balance

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Submitted by

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# Executive Summary

On September 12, 2016, Chancellor Andrew Leavitt charged a study group to investigate employee work-life balance at UW Oshkosh. The purpose of the project was threefold:

a) To study national best practices of family-friendly work environments in higher education.
b) To gather needs and concerns with regard to family-friendly support services.
c) To present findings by developing organizational options for improving work-life balance.

A review of best practices identified in the work-balance and family-friendly policy literature revealed that UW Oshkosh is quite competitive with the number and variety of life balance policies reaching all areas of employee lives. However, open forum discussions and two surveys conducted by the study team found that the life balance culture and climate at UW Oshkosh diminishes the use and effectiveness of these policies for employees. From a sample of over 400 university employees, we found:

1. More than half of respondents (56.36%) felt their physical health is negatively affected by a lack of work-life balance.
2. Close to half (48%) said their mental health was negatively affected.
3. Almost half (46.13%) felt their financial health and career health (43.75%) were negatively affected.
4. A smaller number reported that relationship (27.75%), holistic/spiritual (22.00%), and intellectual (19.7%) health were negatively affected.
5. Women were almost twice as likely as men to report negative physical impacts.
6. Racial, sexual, and/or gender minorities reported significantly more negative effects.
7. A majority of respondents agreed that their unit had staffing shortages (55.83%) and that their workload had significantly increased in the last few years (66.27%).
8. A majority of respondents felt their compensation did not maintain their standard of living (57.93%) and there was low morale in their unit (64.18%).
9. Racial, sexual, and/or gender minorities reported greater concerns with workload and staffing.

When asked about the source of these issues the vast majority of employees (82.88%) attributed them to budget cuts, more than a third faulted poor resource allocation by administration, and just under a third (29.35%) identified inadequate work policies and practices as the culprit. When asked about work hours, we found:

1. A majority of respondents (51.36%) are *expected* to work on nights and weekends, they are *expected* to check email outside of work (52.10%), and work more than 40 hours a week (66.01%).
2. Among the faculty, 93% reported working more than 40 hours a week.
3. 60.25% of employees reported having flexibility in their schedule.
4. 45.66% expressed frustration with leadership while 27.05% experienced frustration with colleagues.

5. Employees who were racial, sexual, and/or gender minorities reported greater concerns with working conditions and arrangements, including greater frustration with leadership and colleagues.
6. A majority indicated that they were satisfied with the benefits at UW Oshkosh (56.32%) and with communication about benefits (56.86%), but were frustrated with the rising cost of benefits (70.65%).
7. Only 40.95% of employees believed that they were able to balance work with caretaking responsibilities. Faculty and instructional academic staff reported higher levels of difficulty than university staff and administrators. Racial, sexual, and/or gender minorities reported higher levels of difficulty than non-minorities.

If money were no object, the top five suggestions for improving work/life balance were:
1. Improve compensation/rewards/incentives
2. Reduce workload/number of work hours
3. Increase flexible scheduling/telecommuting
4. Improve benefits coverage
5. Address staffing shortages

Taking the literature review and campus surveys into consideration, the authors of this report map out four options for the institution:
1. Status quo - no change in policies or in culture
2. Culture change with no new policies or initiatives
3. Increase/improve life balance policies and programs
4. Culture change with increased and improved life balance policies and programs

We outline pros and cons of each of these options and, assuming the institution chooses Option 4, we outlined next steps under the assumption that each of the other options could be met by pursuing a subset of these steps.

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# Introduction

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a) To study national best practices of family-friendly work environments in higher education.
b) To gather needs and concerns from stakeholders with regard to family-friendly support services and coordination of efforts.
c) To present findings by developing organizational options for improving work-life balance and evaluating their pros and cons.

On the heels of declining budgets and staff reductions, the Chancellor's concern for the work-life balance of university employees is justified. Across developed countries, there has been a dramatic increase in hours of work, job insecurity, and pressure to perform more with less along with a corresponding decline in standards of living, health, and job performance. Indeed, the Equal Opportunities Commission (EOC, 2007, p. 13) concluded that: "The way we work no longer fits the changing world we live in. As we look to the future, it looks increasingly unsustainable."

Research on work-life balance reveals a complex interrelationship between work and nonwork domains that place competing demands upon the individual who, in turn, tries to create harmony between them (Abendroth and den Dulk, 2011). The elusiveness of work-life balance has been the subject of many academic and practitioner articles, books, and essays. There is now a robust body of research that establishes the consequences of imbalance and conflict between the competing demands in one's life. Work-family conflict, in particular, has been found to be associated with depression (e.g., Frone, Russell, & Cooper, 1992; Peter, March, & du Prel, 2016), decreased family and job satisfaction (Beutell and Wittig-Berman, 1999; Netemeyer et al. 1996), increased alcohol use (Frone, Russell, & Barnes, 1996), poorer health outcomes (e.g., Singh, et al. 2015), higher employee turnover, and lower organizational commitment (Dupre & Day, 2007; Malone & Issa, 2013; Tayfun & Çatır, 2014). On the flipside, employees who had family-supportive behaviors from supervisors were found to have higher performance than those with supervisors who had not been trained in these behaviors (Odle-Dusseau, Crain, & Bodner, 2016).

Human resource management practices that facilitate fulfillment of competing demands is one way to alleviate work-family conflict and improve work-life balance. Management theory suggests that organizations do so by a) encouraging individual balancing behaviors that mitigate the effects of conflicting roles and b) establishing organizational policies and practices that facilitate individual balancing behaviors and create supportive cultures. It is the latter that we address in this white paper. It is worth noting that organizations can influence the former through training programs that help individuals acquire the necessary self-understanding and skills for managing life balance (e.g., improved ability to set expectations, communicate needs, and implement environmental controls for managing the work and nonwork domains).

This investigation takes a holistic approach to thinking about work-life balance. That is, it is often assumed that work and life are separate. While work is indeed an integral part of life, a review of the literature on life balance and life satisfaction revealed at least seven factors that predict life satisfaction:

1. **Physical Health** (e.g., Gana et al. 2013)
2. **Mental Health** (e.g., Enkvist, Ekström, & Elmståhl, 2013; Fergusson et al., 2015; Ryff, 1989),
3. **Spiritual or Holistic Health** (e.g., Unterrainer et al., 2010)
4. **Meaningful Work/Career** (e.g., Greenhaus, Parasuraman, & Wormley, 1990; Schwepker, 2001),
5. **Financial Health** (e.g., Prawitz et al., 2006; Li, Aranda, & Chi, 2007),
6. **Healthy Relationships** (e.g., Hendrick, 1988; Hendrick, Dicke, & Hendrick, 1998)
7. **Intellectual Growth and Stimulation** (e.g., Chueng, 2000; Park, Lee, & Dabelko-Schoeny, 2016; Ryff & Keyes, 1995)

Each is an important component for achieving life balance and maximizing life satisfaction. Thus, our assessment of UW Oshkosh employees' life balance addresses all seven components. We begin our analysis with a summary of best practices for facilitating life balance in the private sector and in higher education. We then address the current UW Oshkosh and UW System policies for life balance. Next, we discuss our methodology for gathering information from campus stakeholders and present a summary of those findings, identifying many of the campus needs and concerns. We then explore obstacles to current and future policies and cultural changes. Finally, we develop options for UW Oshkosh and consider the merits of each. We should note that it is beyond the scope of this white paper to discuss the details of each and every organizational policy that might be considered a "work-life balance" policy. Therefore, we focus on four broad strategic options and then address policies that hold promise for addressing the most pressing needs identified in our surveys and in our campus open forum sessions.

## Best Practices in Private Sector and Higher Education

Research by the Hay Group (2013) suggests that life balance around the globe is under threat:

> Work schedules are becoming increasingly erratic. More people are working evenings, overnight, or on rotating shifts. And, even among those who work more traditional hours, many are now operating in a global economy and a high-technology society which often means having to extend the working day to accommodate clients and colleagues several time zones apart.

> Couple all of this with the prevalence of two-career families and you have the recipe for work-life balance concerns (p. 2).

According to their research (Hay Group, 2013), 35% of American employees surveyed indicated that their employer did not support them in meeting work-life balance goals and this number has been rising here and abroad. Further, those employees expressed significantly higher turnover intentions than those that felt supported. Hay estimated that this turnover would cost $17.5 million over a two-year period, assuming average employees earned $35,000 per year (Hay Group, 2013).

The question of what is best practice in life balance has garnered a lot of interest and research. The Alliance for Work-Life Progress (AWLP), has laid out a "lesson plan" of seven categories of life balance policies and practices that roughly correspond to the dimensions of life balance identified earlier (AWLP/WorldatWork, 2006). These categories are framed under the umbrella of AWLP's "total rewards" strategy for attracting, motivating, and retaining employees. Within the work-life effectiveness element of the total rewards strategy, the seven categories of support are a) culture change initiatives, b) workplace flexibility, c) creative use of paid and unpaid time off, d) caring for dependents, e) health and well-being, f) financial support, and g) community involvement (AWLP/WorldatWork, 2006). In the private sector, organizations that display best

practices in advocating life balance are aggressively addressing each of these categories. For example workingmother.com's 100 Best Companies for Working Mothers (Working Mother, 2016) provide, on average, nine weeks of paid maternity leave. Some examples from their Top 10 list include:

- A.T. Kearney which provides partial paid time off, phased return from childbirth, childcare resource and referral services, free family counseling, and flexible work.
- Johnson & Johnson which provides six on-site daycare facilities, health and lifestyle coaching, concierge services, nine weeks of fully paid maternity leave, and a high promotion rate for female executives.
- Ernst & Young, LLP which provides up to $25,000 in coverage for fertility treatments and adoptions, 16 fully paid weeks of primary-caregiver leave, new-parent coaching, nursing mom support, child care resources and referral services, backup-care programs, and applied behavioral analysis therapy coverage for children with autism.
- IBM which provides schedule and career flexibility, health insurance with a 20-hour work week, 14 fully paid weeks off for maternity leave, free shipping of breast milk while away from home on business, and life-coaching services.
- Accenture which provides 16 weeks of fully paid maternity leave, an option to work locally for a full year after, free shipping of breast milk home, 120 hours of subsidized backup-care services; and $841 million in employee training and development including 24,000 online-learning courses.

While these companies invest millions in life balance initiatives, there is virtually no limit to the creative ways that organizations could support employee life balance, even at minimal cost. According to AWLP (2011), policies and practices in an organization's best practice portfolio should include:

| Table 1 - Best Practices for Work-Life Effectiveness (AWLP/WorldatWork) | |
|---|---|
| **Caring for Dependents** | |
| **Childcare:**<br>● High-quality on-site childcare<br>● Childcare subsidy programs<br>● Flexible spending accounts<br>● Short-term and sick childcare provider networks<br>● After-school care on campus<br>● Dependent care travel grants<br>● Adoption support<br>● Lactation support<br>● Family Leave<br>● Reserving space in childcare for new employees | **Elder/Adult Care:**<br>● Elder-care consultation and resources<br>● Elder-care workshops and support groups<br>● Subsidized emergency or respite in-home elder-care services<br>● Flexible spending accounts<br>● Bereavement Leave |
| **Proactive Approaches to Health and Wellness** | |
| ● Employee assistance programs<br>● Health promotion initiatives<br>● Concierge service<br>● Workplace convenience services | ● Fitness center affiliations<br>● On-site work-life seminars (e.g., stress reduction, financial planning, parenting) |

| Table 1 - Best Practices for Work-Life Effectiveness (cont.) | |
|---|---|
| **Creating a More Flexible Workplace** | |
| **Full-Time Options:**<br>● Flextime<br>● Telework or Telecommuting<br>● Compressed workweek | **Part-Time Options:**<br>● Part-time schedule<br>● Job sharing<br>● Phased return from leave<br>**Transformational Work Redesign:**<br>● Results Only Work Environment approach |
| **Financial Support for Economic Security** | |
| ● 401(k) plan<br>● Personal financial planning service<br>● Pension plan<br>● Adoption reimbursement<br>● Tuition reimbursement (student aid/loan programs) | ● Dependent care flexible spending accounts<br>● Health care flexible spending account<br>● Voluntary benefits (e.g., auto, home, pet insurance)<br>● Mortgage assistance<br>● Pre-negotiated discounts on products and services |
| **Creative Use of Paid and Unpaid Time Off** | |
| ● Personal days/vacation<br>● Paid holidays<br>● Paid family leave for new parents<br>● Sabbaticals | ● Responsive shift-work policies<br>● Paid leave bank and buy-back programs<br>● Extreme travel comp-time policies<br>● After-hours email and calling policies |
| **Community Involvement** | |
| **External outreach:**<br>● Community volunteer program<br>● Matching gift program<br>**Internal sharing:**<br>● Shared leave program<br>● Disaster relief fund | **Good Corporate Citizenship:**<br>● Corporate Social Responsibility<br>● "Green" initiatives |
| **Eliciting Management Buy-In and Transforming Organizational Culture** | |
| ● Diversity/inclusion initiatives<br>● Women's advancement initiatives<br>● Work redesign (reduce work overload and burnout) | ● Team effectiveness approaches<br>● Generational diversity management<br>● Work environment initiatives<br>● Affinity or employee interest groups |

Source: Alliance for Work-Life Progress/WorldatWork. (2011). *Seven categories of work-life effectiveness: Successfully evolving your organization's work-life portfolio.* Scottsdale, AZ: WorldatWork.

While work in the private sector is very informative regarding best practices for life balance of most university employees, academic settings pose unique challenges due to the constraints of the academic calendar and, for faculty, the boundaries of the tenure clock which coincides with prime child-bearing years. Thus, it is instructive to look at research specifically aimed at best practice in academe.

Within the last two decades, colleges and universities across the country have been developing and implementing work-life balance. However, as noted in Lester and Sallee's (2009, p. x-xi), *Establishing the Family-Friendly Campus*, "Most of the current practices are being developed in isolation, with little evidence of their effectiveness."

In 2005, the Alfred P. Sloan Foundation, in collaboration with the American Council on Education (ACE), issued a trail-blazing report, *An Agenda for Excellence: Creating Flexibility in Tenure-Track Faculty Careers* (ACE, 2005). Many of the "promising practices to address work-life issues" outlined in this report are still the basic benchmarks of effective practice in higher education today. As *An Agenda for Excellence* makes clear, for a university to recruit, retain, and revitalize tenure-track and tenured faculty, it is critical "to realign the structure of the career path to the needs of the academic workforce" (Lester & Sallee, 2009, pp. 1-2). Toward that end, the Alfred P. Sloan Awards for Faculty Career Flexibility have funded many of the most high-profile attempts to promote work-life balance in higher education. The first round of awards went to R-1 research universities, but the second and third rounds of awards went to master's large institutions and baccalaureate institutions, respectively. The ACE has developed a Faculty Career Flexibility Toolkit with resources for administrators and institutions, organized by institutional type (ACE, 2017). In 2012, the Sloan Foundation completed the *Best Practices in Retirement* survey (Sloan Foundation, 2014). In 2013, ACE launched the *National Challenge for Higher Education: Retaining a 21st Century Workforce,* which challenged college and university presidents and chancellors to lead the efforts to promote workplace flexibility (ACE, 2014, 2016a).

There is a general consensus in the scholarly literature on the array of policies that constitute best practices related to work-life balance in higher education. However, the efficacy and scope of these policies are still very much under debate and institution-specific. For instance, there are conflicting assessments about the positive or negative effects of gender-neutral tenure clock extension (Antecol, Bedard, & Stearns, 2006). This report aims to sidestep these unresolved debates to present an accessible big picture to recommend what might work best for our campus community. These policies, drawn from the ACE Toolkit and other sources, can be found in Table 2 and Table 3 below.

| Table 2 - Best Practices for Dependent Care/Caregiving in Higher Education | |
| --- | --- |
| **Childcare:**<br>● High-quality on-site childcare<br>● Childcare subsidy programs<br>● Flexible spending accounts<br>● Short-term and sick childcare provider networks<br>● After-school care on campus<br>● Dependent care travel grants<br>● Adoption support<br>● Lactation support<br>● Family Leave<br>● Reserving and/or guaranteeing space in childcare facility for incoming employees | **Elder/Adult Care:**<br>● Elder-care consultation and resources<br>● Elder-care workshops and support groups<br>● Subsidized emergency or respite in-home elder-care services<br>● Flexible spending accounts<br>● Bereavement Leave |

| Table 3 - Best Practices for Workplace and Career Flexibility in Higher Education |
| --- |
| **All University Employees** |

| ● Phased retirement<br>● Paid parental leave<br>● Shared Leave | ● Flexible Work Arrangements (flextime, telecommuting, adjustments to part-time, seasonal scheduling) |
| --- | --- |
| **Faculty & Instructional Academic Staff [as applicable]** | |
| ● Tenure-Clock Adjustment<br>● Active Service Modified Duties (ASMD) or Partial Relief of Duties, with no reduction in pay<br>● Leave in excess of FMLA<br>● Memoranda of Understanding (MOUs) for expectations during leaves | ● Committee to identify problems and recommend actions regarding the recruitment, retention, and/or career satisfaction of underrepresented groups<br>● Data-tracking of outcomes from pausing tenure<br>● Legacy Projects for Retiring Faculty<br>● Spousal hire policy<br>● Option for Shared Positions |

Academic institutions thus have a wide array of life balance policies available to use. However, the mere presence of policies is not sufficient. Without a culture change, employees engage in bias avoidance behaviors out of a fear that they will be punished for tending to personal commitments. Bias avoidance behaviors are defined as "the strategic minimizing or hiding of family commitments." Significantly, "bias avoidance behaviors disproportionately affect women, and are indicative of gender inequality in the workplace" (Drago, et al., 2008, p. 62). Bias avoidance behaviors are most likely to occur in organizations where work-life policies are poorly articulated, unevenly applied, and viewed as special treatment. Institutions that have made positive changes in their work-life cultures have focused as much attention on the gatekeepers of the policies (i.e., administrators, human resources), as the policies themselves (Bryan, 2014).

Just as there are best practices in the policies themselves, there are organizational best practices for academic leaders to foster a campus climate that promotes life balance. For instance, the ACE notes the importance of data-tracking: "Proactive institutions are not only creating better policies, but are also monitoring use by race and gender, and tracking long-term outcomes of policy usage" (ACE, 2014, p. 8). Additionally, it is critical that institutions conduct a cost-benefit analysis of policies once they are in place. When Iowa State University conducted a cost-benefit analysis of their work-life policies, they discovered that increased retention was a significant cost saver compared to rehiring. Similarly, the ACE mentioned that administrators tend to overestimate the cost of work-life policies (ACE, 2014). These practices are aimed at creating a culture that embraces life balance as an essential component of a healthy work environment and recognizes that employees who achieve life balance are more productive, better service-providers, and both physically and mentally healthier. Table 4 identifies best practices for creating a culture that values life balance.

| Table 4 - Best Practices for Creating a Culture of Life Balance |
| --- |
| **Administrator Practices** |

- Training for all administrators, supervisors, managers, department chairs and program chairs on compliance with policies and promoting work/life balance
- Evaluating supervisors on their support of life balance as expressed by their direct reports
- Establishing and clarifying formal written policies to mitigate the risk of uneven treatment and discrimination
- Making policies opt-out rather than opt-in when appropriate
- Strengthening transparency, communication and outreach by making information easily accessible online
- Making visible what's possible: e.g. a "menu" approach to family leave
- Data-tracking to monitor the use of policies, reasons for leaving, tenure denials as well as the level of life balance expressed by all university employees
- Centralizing the funding of life balance policies to ensure even implementation and access throughout the organization

The following are examples from other institutions of some of these organizational best practices:
- Michigan State University's centralized WorkLife Office
- Iowa State University's Work/Life Data Tracking Project & an overview of their broader Integrated Approach to institutional culture shift
- University of Colorado at Boulder's StratEGIC Toolkit of research-based advice for institutional change, particularly concerning flexible work arrangements, family-friendly accommodations, improving departmental climate
- Brown University's Family-Friendly Scheduling Memo.

## Current Campus Policies, Procedures, and Practices

A review of UW Oshkosh and the UW System policy and practices shows that the institution has a considerable repertoire of policies related to life balance. The list is extensive in both its breadth and depth, covering such things as child care, leave, wellness, flexible work arrangements, faculty and academic staff conversions, employee benefits, and retirement. Rather than listing all of the policies here, for the sake of brevity, a tabular summary of each can be found in Appendix A. For each policy we note their source, issues related to practice, and, when expressed, known or anecdotal findings and concerns.

## Methodology

Of course, as noted in the earlier section on best practices, the mere existence of policies designed to facilitate life balance is no guarantee that employees feel free to use the policies or that the policies are being practiced as intended. Actions speak louder than words when it comes to life balance. The actions of individual supervisors as well as higher level administrators can render policies completely irrelevant, make them an unmitigated success, or somewhere in between. To assess the extent to which campus constituents *felt* they were *achieving* life balance, we gathered information regarding life balance needs and concerns in our university community in the following manner.

First, we reviewed current campus policies related to life balance. Each policy was discussed by the committee members. We discussed effectiveness of the policies (using data that had been collected in a previous study), identified possible barriers to the implementation of the policy, and identified whether the origin of the policy was college, campus-wide, UW System, or state statute. Second, we enlisted the

assistance of a student to investigate policies of other institutions (as published on their web sites) and recorded these into a spreadsheet. Third, we held two listening sessions in November that focused on five key discussion topics: working conditions and arrangements, benefits, care-taking responsibilities, professional development, and retirement. This was then followed by an opportunity to discuss any other issues related to life balance that employees wished to discuss. Finally, two campus-wide surveys were administered in November. The first survey, summarized in Appendix B, was very short and asked employees to indicate which life balance policy areas were most in need of being addressed on our campus. The items receiving the highest ranking in terms of concern to employees were working conditions, benefits, and caretaking responsibilities. We used these results to guide our campus-wide discussions by asking for specific feedback in these areas (although participants were free to discuss any concern they had about life balance.) These results were used to build questions for the second survey.

The second survey assessed current levels of life balance in the seven critical areas (physical health, financial health, mental health, relationship health, career/work health, intellectual health, and holistic health) and asked more detailed questions about the five policy areas addressed in the listening sessions. We present a written summary of the key findings from Survey 2 in the next section. A complete summary of the descriptive statistics from this survey can be found in Appendix C. Appendix D provides a summary of the responses broken out by race, gender identity, and other demographic variables.

## Campus Needs and Concerns - Survey 2 Summary

We received 407 responses to the second survey. Of these respondents, 88.75% were full-time, with representation from all employee groups (university staff - 27.25%; professional academic staff - 29.00%, faculty - 27.75%, instructional academic staff - 9.25%, and LTE - 3.25%, and administration - 0.75%) and campus units (COLS - 28.57%; Student Affairs - 15.05%; COEHS - 9.69%; Academic Affairs - 9.18%; Administrative Services - 6.38%; COB - 6.12%; CON - 4.85%, Foundation - 2.04%; and Chancellor's Office - 1.02%). When asked about gender identity, 25.94% identified as cisgender male, 70.53% identified as cisgender female, 2.52% preferred not to indicate their gender identity; 92.37% identified as heterosexual and 7.63% indicated another sexual orientation. When asked about their race, 93.00% of respondents indicated "white or European American." Most of the respondents were married (73.23%), had no military service (92.38%), and fell between the ages of 36 and 55 (55.53%). A full 23.12% were 56 and older with approximately the same proportion falling in the 35 and under age group.

Of great concern to the campus community, more than half of respondents (56.36%) agreed or strongly agreed that their physical health is negatively affected by a lack of work life balance. Close to half (48%) said their mental health was negatively affected and almost the same number (46.13%) felt their financial health and career health (43.75%) were negatively affected as well. A smaller number of respondents reported that relationship (27.75%), holistic (22.00%), and intellectual (19.7%), health were negatively affected. Women were almost twice as likely as men to report negative physical impacts. Employees who were racial, sexual, and/or gender minorities reported significantly more negative effects of life imbalance, particularly in the areas of physical, mental, and financial health.

A majority of respondents agreed that their unit had staffing shortages (55.83%), their workload had significantly increased in the last few years (66.27%), their compensation did not maintain their standard of living (57.93%), and there was low morale in their unit (64.18%). Employees who were racial, sexual, and/or gender minorities reported greater concerns with workload and staffing. Overall, respondents attributed the cause of these issues as budget cuts (82.88%), poor resource allocation decisions by management

(36.41%), inadequate work policies and practices (29.35%), technological changes (12.77%), and other factors (28.80%) such as retirements, leadership, political climate, and structural changes within the University.

A majority of respondents (51.36%) reported that they are *expected* to work on nights and weekends, they are *expected* to check email outside of work (52.10%), and they work more than 40 hours a week (66.01%). Among the faculty, 93% reported working more than 40 hours a week. On the positive side, 60.25% of employees reported having flexibility in their schedule (e.g., alternate work arrangements such as telecommuting or flexible hours.) Among all employees, 45.66% expressed frustration with leadership's handling of work/life balance on campus while 27.05% said they were often frustrated with their colleagues. Employees who were racial, sexual, and/or gender minorities reported greater concerns with working conditions and arrangements, including greater frustration with leadership and colleagues.

A majority of respondents indicated that they were satisfied with the benefits at UW Oshkosh (56.32%) and with communication about benefits (56.86%), but were frustrated with the rising cost of benefits (70.65%).

Only 40.95% of employees believed that they were able to balance work with caretaking responsibilities, with significant variation across demographic categories. Faculty and instructional academic staff reported higher levels of difficulty, as did racial, sexual, and/or gender minorities. When asked whether they felt they were able to add a child to their family without negatively affecting their work, only 15.8% agreed or strongly agreed. Again, faculty and instructional staff expressed greater difficulty, as did racial, sexual, and/or gender minorities. Only 11% of cisgender men disagreed with the statement that they were able to add a child to their family without negatively affecting their work. However 20% of cisgender women, 29% of gender minorities, 39% of racial minorities, 36% of faculty, 29% of instructional academic staff, and 31% of sexual minorities disagreed with this statement. Only 16.4% of respondents agreed or strongly agreed that they were able to take 6 weeks off after the birth or adoption of a child with faculty, instructional academic staff, and women reporting the greatest difficulty.

Respondents appear to struggle balancing work with the care of parents or older relatives with (16.66%) disagreeing with the statement that they can combine work with care of these individuals and (20.90%) agreeing. Similarly, 14.62% disagreed that they could combine work with caring for someone with medical challenges versus 18.09% who agreed that they could. Finally, 11.83% believed they could not combine work and caring for someone other than children or parents while 9.14% agreed they could. We should note that the majority of respondents neither agreed nor disagreed with this statement, possibly because they have not yet been put into such a situation.

Finally, our survey asked three open-ended questions regarding concerns about work life balance and suggestions for improvement:

1) Please add any concerns about work-life balance or any suggestions on how to improve work-life balance at UW Oshkosh. (160 responses)
2) If money, laws, and UW System regulations were not obstacles, what ONE change would you make to improve work-life balance at UW Oshkosh? (325 responses)
3) Within the bounds of a limited budget and numerous laws and regulations, what ONE change would you suggest to improve Work Life Balance at UW Oshkosh? (285 responses)

The table 5 below shows the breakdown of topics and frequency of comments in the responses given. While the majority of comments expressed desire or concern, some comments identified strengths such as, "Flexible work times are a big plus… Continue to support a flexible workplace in various capacities…." Thus, the counts presented below should simply serve to identify what was important to people. Some of the things that were most frequently mentioned were 1) reduce the workload and expectations to work extra hours, evenings, and weekends; 2) improve salary and rewards; 3) address morale issues; 4) offer flexible scheduling and options for telecommuting; 5) improve benefits; 6) increase or better allocate staffing; 7) provide better leadership training; 8) improve professional development and performance management; and 9) provide additional help with caretaking (mainly by increasing hours and year-round access to the daycare center as well as sick child provisions). It is worth noting that the university already has policies addressing some of the issues raised, suggesting that employees either do not know about the policies, supervisors are not allowing employees to exercise the policy, or both.

| Table 5 Number of Comments | | | |
|---|---|---|---|
| | **Concerns about life balance** | **One change if money were no object** | **One change within budget constraints** |
| Workload/Number of Work Hours | 31 | 56 | 66 |
| Compensation/Rewards/Incentives | 25 | 126 | 41 |
| Morale | 32 | 17 | 33 |
| Flexible Schedule/Telecommuting | 18 | 50 | 63 |
| Benefits | 22 | 49 | 27 |
| Staffing | 14 | 35 | 17 |
| Leadership | 17 | 17 | 23 |
| Professional Development/Performance | 14 | 13 | 13 |
| Caretaking Responsibilities | 12 | 7 | 12 |
| Resources/Budget/Supplies | 4 | 9 | 11 |
| Exercise/Wellness Programs | 4 | 7 | 4 |
| Facilities/Equipment | 2 | 4 | 4 |
| Miscellaneous | 14 | 11 | 7 |
| **TOTALS** | **202** | **398** | **312** |

Table 6 provides examples of the kinds of statements that were made regarding various issues of concern to them. Some of these comments are very concerning, especially with regard to workload expectations, poor treatment of employees, and fairness in the application of flexible work arrangements and time off. While not all employees were suffering from low morale, the comments certainly suggest that there is a high level of anger, frustration, and demoralization among the respondents. The comments serve as an important "call to action" for our campus, not only in the formation and application of policies but also in the level of courtesy, respect, and care we express toward each other in our daily work lives.

| Table 6 - Sample Comments from Life Balance Survey |
| --- |
| **Workload** |
| <ul><li>"Administration should stop giving departmental units and programs more admin work."</li><li>"Our department will work 3 weeks straight during mid summer without a day off. At times, I have worked almost a month straight without a day off in the middle of summer."</li><li>"Very frustrating when you have one unit very overworked and others who have a lot of free time."</li><li>"Huge reduction in staff meant I can't even take a sick day because there's no one else to do my job. I've worked here for 15 years and used to love my job. I can no longer say that. Workplace Joy is a joke."</li><li>"I would love for there to be a way that 20% of the faculty doesn't do 80% of the committee and service work."</li></ul> |
| **Flexible Work Arrangements** |
| <ul><li>"... some University Staff and Academic Staff would love to work four 10 hour days instead of the standard five 8 hour days."</li><li>"Removal of a forced 45 minute unpaid lunch break for university staff."</li><li>"Do not give limitations on when to take personal leave or holiday pay. Many of us cannot take our time off due to staffing…"</li><li>"...some people are allowed flexible work schedules while others aren't. This frustrates me beyond belief."</li></ul> |
| **Compensation** |
| <ul><li>"Hard to see all the expansion (and I know we are talking about different pots of money) and the lack of increase of salary for the hard workers on campus."</li><li>"Increase the money paid to employees so that the higher education degrees earned to work in higher education don't bankrupt higher education employees due to long term loan repayment plans that have, in my case, surpassed the income level of a 'professional degree salary'."</li><li>"Moving to the private sector usually came with increased pay, but not so good benefits; however, with all the benefit cuts, the private sector now has better pay AND better benefits, so what's the point of staying here?"</li></ul> |
| **Leadership** |
| <ul><li>"Administration on campus should be able to see that some department heads that have been in the position for a long time, lack of morale in department and move them out or retire them to get more innovation in leadership."</li><li>"Leadership is too disconnected and untouchable."</li><li>"Transparency and equal application of policy."</li><li>"Take reporting of hostile work environments more seriously."</li><li>"We went from a campus that promoted heavily within to one that is avoiding it at all costs."</li><li>"Lacking strong leadership in our staff supervisors to provide healthy expectations and processing through change."</li></ul> |
| **Benefits** |
| <ul><li>"...my salary hasn't increased when you factor in reductions to fringe benefits. It's really frustrating as a young professional."</li></ul> |

- "Increase pay and benefits."
- "Better pay, better benefits (pay cuts and rising benefit costs = stress)."
- "Better health insurance, without being nickeled and dimed with co-pays and esoteric deductibles, without worrying whether our daughter can continue to see her medical specialist…"

| Table 6 - Sample Comments from Life Balance Survey (cont.) |
|---|
| **Morale** |

- "A lot of the low morale in our division comes from certain people and how they interact with others. Some of them are not nice to others."
- "Work Life Balance is not rewarded or appreciated. It begins at the top."
- "I think sometimes there is this mentality that, 'if you don't do it / can't handle it, there are a million people to take your place.' I think that everyone wants to feel valued, so hearing things like that is horrible for morale…"
- "Our department is in the habit of making policies to correct one employee's behavior, which really affect the morale and trust within our organization. It is hard to work and feel invested without trust."

| **Caretaking** |
|---|

- "Devote more substantial energy and resources to helping employees move or start a family here . . . it is hard to feel like this is home when the rest of our family isn't cared for."
- "Better drop in child care hours/system…"
- "Too much emphasis on people with children, not as much concern for those with aging parents."
- "Continue to allow children to come to campus...I appreciate that I can do this in an environment that is supportive to both my career and my family."
- "Childcare for mildly sick children."

| **Professional Development/Performance Management** |
|---|

- "Career Services could provide a service to employees to review resumes and work with them to get training to meet a career goal, and suggest positions that fit."
- "Perform skip-a-level reviews."
- "...also promote professional development. People like to grow. I'd like to take classes to be a better employee here at UWO but neither I nor my department can afford…"
- "Hold people accountable for unprofessional cruelty to employees."
- "More educational opportunities for advancement."

| **Facilities/Space** |
|---|

- Let employees organize office layout, close university buildings in summer that aren't used, fix chipping paint and ugly interiors, increase safety in winter.
- "Be able to work from home instead of staring at a chipped beige paint, uninspired wall."
- "Do not neglect the small things—(e.g. clean windows and carpets)—while having them don't improve morale, losing them can damage morale."
- "Give employees input in office layout and cubicle format.

| **Exercise** |
|---|

- "Add workout area for staff in each building."
- "More free group workout classes, boxing or kicking boxing."
- "We need to MOVE more. Treadmill desks or workout areas are desperately needed."
- "More options for exercise at work. Maybe getting a discount at the SRWC."
- "More exercise classes and group walks (in nice weather) and increased discounts at local YMCA."

# Organizational Options

When considering our next course of action, the institution has four options available to it. We discuss each of these options below and consider the costs/disadvantages and benefits associated with each. Note that we do not attempt to place a dollar value on each individual policy as that would require data that is not currently accessible to the Study Group. However, we do wish to point out that such a valuation process is both possible and desirable. It will, however, require coordination among the Human Resources department, Institutional Research, and a methodologist/statistician with training in policy valuation (ideally with experience estimating return on investment to HR policies specifically).

### Option 1: Status Quo

The first option available to the institution is to retain all current policies and practices with no substantive changes to either. This option recognizes that there are costs associated with change and with any new life balance benefits. It is difficult to estimate the value of any new policy since it typically requires information such as:

1. An estimate of the relationship between job satisfaction and negative behavioral outcomes (e.g., avoiding or shirking work duties, turnover, absenteeism, presenteeism, theft, and sabotage).
2. An estimate of the relationship between job satisfaction and positive behavior outcomes such as organizational citizenship behaviors, applicant attraction, productivity, and performance.
3. Reasonable estimates of costs attributable to negative behaviors.
4. Reasonable estimates of the savings attributable to positive behaviors.
5. Reasonable estimates of the policy utilization rates.

Given that it is difficult to assess the value of new policies, the organization may wish to continue to operate as it currently does and simply wait until the demand for a particular policy becomes clear through the expressed desires (or frustrations) of employees. It could, during this same time, begin working to collect data and improve its sophistication related to such valuation procedures.

Option 1 Benefits:
- No additional costs associated with new or improved policies
- Easiest course of action requiring no additional investment of time or effort on the part of the institution
- Provides time for the organization to explore best practices, gather more information, collect data, and develop policy valuation expertise

Option 1 Costs/Disadvantages:

- No improvement to or further erosion of employee life balance
- No improvement to or further negative outcomes of life imbalance identified by employees: declining physical, mental, and financial health
- Does not improve utilization of the current policies adopted by our campus, rendering the policies themselves ineffective
- Increases costs associated with negative employees behaviors (e.g., increased turnover, increases medical claims, increased absenteeism, decreased organizational commitment)
- Reinforces the feeling that nothing will be done as a result of this or the workplace joy initiative.

## Option 2: Culture Change with No New Policies or Policy Improvements

The second option available to the University is to retain the same policies but work to build a culture that encourages implementation and usage of those policies. This option recognizes that UW Oshkosh already has a rich menu of policies aimed at improving life balance, but also recognizes that the policies may not be well-known, sufficiently understood, or uniformly supported by supervisors. Furthermore, employees may be concerned about work coverage or performance-based consequences (e.g., negative performance review, reprimanded, or overlooked for promotion) if they utilize the policies.

Under this option, the University would commit to at least five best practices that have been shown to facilitate implementation of life balance policies:

1) Staffing Planning

Perhaps the key problem identified within the University when it comes to utilizing life balance policies and feeling a sense of life balance is the lack of strategic staffing planning. A majority of the employees surveyed identified poor staffing and increased workload as problematic in their work lives. A full 78% of faculty, 70% of university staff, and 66% of professional academic staff indicated that their workload had increased. The numbers were a bit lower for instructional academic staff at 46%.

In addition, the majority of faculty indicated that they were a) expected to be available for work on nights and weekends (69%), b) expected to check email even when not at work (85%), and c) expected to work more than 40 hours per week (93%). A full 72% of professional academic staff indicated that they were often working more than 40 hours per week while 55% indicated that they were expected to work nights and weekends. Understaffing was reported by 61% of university staff, 60% of faculty, 55% of professional academic staff, and 43% of instructional academic staff. Viewed together, these statistics indicate that there is a real burden on university employees to be available even when not on work duty, to work outside standard work or class/office hours, and to work more than a 40 hour workweek. It is unlikely that such an organization will achieve a culture of life balance without extreme measures to provide amenities at work such as laundry services, grocery delivery, food preparation service, onsite childcare, sick child care, and onsite banking to maximize leisure in nonwork hours.

To staff workloads appropriately, there needs to be an active, ongoing process of strategic staffing planning. Such a plan would ensure that the University has the right mix of employee skills in various job categories, sufficient cross-training to allow flexible deployment of staff (e.g., regular, LTE, and student workers) to cover high workloads in areas when needed, and anticipate future staffing needs of the organization to prepare for changes in technology and job design.

2) Employee Training and Socialization

The literature on life balance has found that employee perceptions of their supervisor's attitude toward using life balance policies is important to determining their usage or "uptake" (Hammer et al., 2011; Kossek, Lewis, & Hammer, 2009; McCarthy & Grady, 2008). Similarly, employee perceptions of how policy utilization will either be perceived by other employees or how it will affect other employees may be important to uptake decisions. Thus, employees need to be trained to understand their policy options, the value of the policies, their rights related to the policies, and processes to follow assuming they are wrongfully prevented from using a particular benefit to which they are entitled.

3) Supervisory Training, Socialization, and Motivation

Proper training, socialization, and motivation of supervisory staff is essential to creating a culture of life balance. Researchers have labeled supervisors as "gatekeepers," facilitating or withholding access to organizational policies meant to help employees balance their lives (McCarthy, Darcy, & Grady, 2010; Poelmans & Beham, 2008; Ryan & Kossek, 2008). There are three important aspects to this: supervisor program awareness and instrumentality perceptions, supportive supervisor attitudes, and supervisor incentives. Training would include helping supervisors to a) know about the policies, b) understand the policies, c) properly interpret the policies, and d) understand circumstances dictating the proper implementation of policies. Socialization involves changing supervisors' preconceived notions about the value of life balance, ensuring they understand unconscious bias and its effect on case-by-case implementation decisions, and supporting or reinforcing their appropriate decisions. Finally, rewarding supervisors for having knowledge of the policies and applying them appropriately, addresses supervisor incentives.

4) Leadership Commitment and Development

For life balance policies to work, top management within the organization must be willing to commit to making it a priority. They will need to develop the skills and resources necessary to support a culture transformation and maintenance. In most cases, successful implementation will rest upon alignment between compensation systems, staffing systems, performance management systems, and training. Organizations will be more successful when they include life balance metrics of their employees in the performance evaluations of supervisors and managers, create compensations systems that reward said performance and eliminate incentives for withholding use of life balance policies, and invest in staffing planning to ensure adequate staffing levels. In short, leaders must ensure that their words are backed up by actions. They should establish organizational norms for work hours and encourage employees to adhere to those norms. They should understand labor standards and ensure adherence. They should invest in their own training and understanding of the effect of life imbalance on their organization and develop the skills and tools necessary to clear the path toward a culture shift. One step in this direction would be for the University to join the College and University Work-Family Association that supports the creation of healthy and productive work environments and employee work-life effectiveness over the lifespan (CUWFA, 2017). The annual institutional membership is a modest $350.

5) <u>Internal and External Partnerships</u>

According to Koppes (2008), one lesson learned from assisting organizations to transform their culture to one of work-life effectiveness, is the need to engage in internal and external partnerships. By drawing on the strengths of organizations in the community such as outside consulting groups, community organizations such as the YMCA, local daycare or eldercare centers, and area health providers, the institution can accomplish much more than it could alone. A relatively easy best practice is the creation of a family advocate position. Montana State University developed this model to "help parents and other family members navigate the University System and learn about MSU's policies and programs available to meet their individual and family needs" (Montana State University, 2016). The family advocate would provide one-stop advice on managing family issues such as sick children, aging parents, medical issues, pregnancy, leave, new parenting challenges, etc., particularly in catastrophic and unusual situations. With expert knowledge of available programs in the community, the family advocate could help to establish partnerships and link employees with appropriate community services and organizations.

Option 2 Benefits:
- No additional costs associated with new or improved policies
- Increases likelihood of utilizing existing policies
- Increases likelihood of improved life satisfaction for employees
- Decreases costs associated with negative employees behaviors (e.g., increased turnover, increased medical claims, increased absenteeism, decreased organizational commitment)
- Culture change that supports life balance

Option 2 Costs/Disadvantages:
- Increases costs due to higher utilization of existing policies
- Increases costs associated with training, socialization, and development of practices
- Increases costs associated with organizational change (e.g., turnover of supervisors who cannot adapt to the new culture)

**Option 3: Increased Menu of Policy Options and Policy Improvements**

Independent of a change in culture, the Study Group identified several possibilities for improving existing policies or adopting new ones. New policies and policy improvements could be implemented to align UW Oshkosh more closely to its peers among Master's Large Institutions using the ACE Toolkit (ACE, 2017). Hence, one option would be to focus on these improvements without addressing the existing culture for policy utilization. This option could be described as the, "if you build it, they will come" approach. We would recommend that the institution start with things that are really important to people and carry a relatively low cost, such as equitable flexible work hours or internal training and development. Here are five improvements mentioned by employees and identified by our work examining best practices:

1) Facilities and Facility Access Improvements

Several suggestions were made regarding improvements to facilities and facility access. These changes would require modifications of existing spaces, allowing additional spaces to be used, or increasing access to existing spaces.

- Exercise spaces. Create more exercise spaces across campus and allow cross-purposing of existing spaces (i.e. yoga or aerobics in a faculty or student lounge) to facilitate more physical activity for employees. Ideally there would be at least a small space for working out in each building on campus (e.g., a treadmill and free weights.) This option would require the institution to check its risk management and insurance policies and inform employees and supervisors of these policies.
- Restful spaces. Create more indoor and outdoor spaces that allow for meditation, reflection, and uninterrupted quiet time.
- Accessibility. Increase access to existing exercise spaces such as Albee, Kolf, or the Recreation and Wellness Center by extending hours and decreasing costs to university employees.
- Fees. Eliminate user fees or family fees such as the $5 swim fee at Albee which add cost for employees and decreases opportunities for them to spend leisure and exercise time with family members. Evaluate current employee access fees to ensure that they are affordable or use sliding scale fees that assess different amounts based on an employee's salary level or category.
- Ad hoc lactation accommodations. UW Oshkosh has a limited number of lactation rooms on campus, but it has no process for ensuring that nursing parents have appropriate and convenient spaces for lactation when returning to work. UW Whitewater has a simple three-step process to encourage employees to communicate their lactation needs to HR and Facilities before returning to work, with assurances that those needs will be met in a timely manner. UW Oshkosh could adopt a similar process.

2) Wellness Programming

- Insurance coverage of fertility treatments. Many university health insurance policies cover a range of fertility treatments, including fertility drugs (e.g. Clomid), testing (ovarian dye test), artificial insemination, and sometimes IVF (usually a limited number of cycles). The State of Wisconsin group plans do not cover anything. This is a big impediment for women in academe especially because the biological clock and the tenure clock are often in conflict. UW System schools might be especially well-positioned to advocate for change in this area as we currently lag behind peer institutions. As a point of comparison, Illinois Law requires that employers with more than 25 employees have infertility coverage in their insurance plan (Illinois Compiled Statutes 215 ILCS).
- Offer seminars on mindfulness meditation, psychology, conflict management, active listening, and other skills related to interpersonal communication, respectful dialogue, and healthy conflict.
- Religious and spiritual accommodation. Improve campus understanding of religious and spiritual accommodation needs and develop policy and practice to improve access and accommodation of these practices.
- Dental and health coverage. More extensive dental coverage for non-metallic fillings, crowns, and bridges, which may be partially cosmetic. Health coverage that will cover some procedures that are not a threat to health but do affect public image (e.g., acne).

3) Professional Development

- Opportunities for personal growth. Offer more learning opportunities aimed at personal growth such as public speaking, personal finance, financing of higher education, current events, personal professional development planning, vocational testing, and career planning.
- Career ladders and internal promotion. Improve internal career ladders and internal promotion policies. Examine existing career ladders to identify natural paths and then advertise and encourage employee progress along these paths. Allow more internal promotion opportunities and clarify knowledge, skills, abilities, and other characteristics necessary for internal promotion. Utilize Human Resources Information System (HRIS) to track employee skills and experience. Utilize Human Resources to facilitate succession planning and decision-making regarding employee development.
- Tuition reimbursement. The institution currently has a tuition reimbursement policy but there are inequities when it comes to how the policy is applied across departments/units/divisions and what funding is available to cover tuition reimbursement. Creating a separate central fund could improve accessibility for all employees whose units have no budget for such expenses. The focus on this budget, however, should be on expanding access, not limiting access in units that can afford to reimburse employees at higher levels. This will be particularly important under a new budget model as it should encourage units to invest in employee development.
- Spousal/partner placement. Create a spousal/partner placement policy similar to that found at UW Madison that assists with finding job opportunities for spouses/partners when they are qualified for a position. Provide a path to permanent employment, particularly when a spouse/partner has worked as ad hoc staff for an extended period of time.
- Leadership training. Additional training is needed at all levels of supervision to help chairs, assistant deans, deans, and other administrators better understand both cultural and policy issues that affect the life balance of university employees.

4) Family Care Policies

- Childcare/Eldercare. Provide a service to assist employees with childcare and eldercare responsibilities, particularly in instances of illness or when the university childcare center is closed. Care@Work is a private provider for childcare/eldercare for companies. [Michigan State University,](link) [Santa Clara University,](link) and Northwestern University have all hired Care@Work to create care-provider platforms and infrastructure for employees. Care.com offers a range of childcare, pet care, and eldercare in the Fox Valley. This service could be highlighted on the University's Parent's Resources web page. Improve accessibility of university daycare by adding hours and increasing availability of spots.
- Active service modified duties (ASMD) policy. In the ACE survey of Master's Large Institutions (ACE, 2016b), "61% had some type of a formal, written modified duties policy that allowed for a temporary period of modified duties with no reduction in pay." These policies are often utilized following the birth or adoption of a child.
- Policy on spousal hiring/dual-career couples.
- Extension of contract. Clarify the rights of instructional academic staff with regard to probationary extension of contract due to birth or adoption of a child.
- Leave policies. Explore options for banking, sharing, or borrowing leave.
- Breastfeeding policy. Adopt a policy supporting the right of employees to breastfeed as an important signal of the family-friendliness of a campus. UW Whitewater has a formal [Policy for Supporting Breastfeeding Employees](link) that affirms the federal rights of nursing parents.

- Benefits orientation. Regularly offer benefits orientations to any employee as a refresher of what is available to them. After the initial new employee orientation an employee, especially one with many years of service, may learn of benefits they forgot about or did not know were available.
- Discounts for UW Oshkosh employees. Create a more visible way to inform employees about the various discounts they and their family members can receive on and off campus at local and area businesses. Implement new discounts for meals, tuition, and bookstore items to help with lagging compensation.
- Allow parental leave and other benefits such as technology support for long-term ad hoc employees.

5) Workload Policies

- Course capacity limits. Consider capping class sizes at the levels recommended by national professional organizations. For instance, the Conference of College Composition and Communication (CCCC) recommends that "No more than 20 students should be permitted in any writing class. Ideally, classes should be limited to 15. Remedial or developmental sections should be limited to a maximum of 15 students. No English faculty members should teach more than 60 writing students a term" (CCCC, 2015).
- Phased retirement policy. Consider formalizing and implementing a phased retirement policy that would allow for employees to ease into retirement through part-time work, job sharing, reduced hours, change of duties/level of responsibility, and opportunities to pass on knowledge by developing training manuals, documenting processes, and/or mentoring new employees.
- Modified duties policy. Allow for a reduction in work duties at the same level of compensation when returning from parental leave. Fill the gap between sick leave, short-term disability, and ADA accommodations to provide new parents with lighter duty for a time to ensure they have successfully adapted to caring for their new child.
- Standardize expectations. Determine reasonable workload expectations (e.g., hours of work) and establish guidelines for faculty and staff. Develop incentives so that employees taking on additional duties are compensated fairly. Educate supervisors on workload practices. Establish reasonable expectations with students regarding faculty and staff workloads.
- Scheduling rights for long-term academic staff. Provide academic staff members who have been teaching within the same department for an extended period of time the same scheduling rights provided to tenure track faculty (i.e., ability to indicate choice of courses, time/day of courses.)
- Alternative teaching/research track. Allow faculty the option to chose an alternative "teaching only" or "research only" track, perhaps as part of a phased retirement plan.
- Back-up staff. Cross-train, rely more on LTE's, and otherwise develop methods to provide backup to employees so that they can take their vacation time. A suggestion from one of the open forums that this study group facilitated was to re-establish a pool of available LTE's. As need arises, staff from the pool could be available immediately or very quickly to temporarily fill vacancies.

Option 3 Benefits:
- Increases likelihood of utilizing existing policies
- Increases likelihood of improved life satisfaction for employees
- Decreases costs associated with negative employees behaviors (e.g., increased turnover, increased medical claims, increased absenteeism, decreased organizational commitment)

Option 3 Costs/Disadvantages:
- Increases costs due to new or improved policies
- Costs associated with establishing new policies (e.g., research costs)

● Costs associated with higher utilization of new policies

**Option 4: Increased Menu of Options with Culture Change**

The final option is to increase the University's menu of policy options while, at the same time, working to improve the culture of the institution. This option combines Option 2 and Option 3 and, therefore, would present the highest costs but also the highest potential reward.

We note here that there are tools and processes available to organizations looking to make these changes. These are intended to help put a structure and framework on the work that would be needed, allowing the organization to assess needs, identify priorities, estimate costs, develop action plans, and track success. We list a few of these resources and references in Table 7.

| Table 7 - Resources for Planning and Monitoring Progress on Work-Life Balance | |
|---|---|
| *Introduction to work-life effectiveness: Successful work-life programs to attract, motivate, and retain employees* | Course offered by Alliance for Work-Life Progress/WorldatWork that provides education on 7 categories of work-life effectiveness under the total rewards model . |
| *The Link: A Practical Guide to Conducting a Work/Life Workplace Assessment* | From the Center for Work & Family, this guide walks an organization through steps of planning, implementation, and evaluation with helpful worksheets at each stage. |
| *Metrics Manual: Ten Approaches to Measuring Work/Life Initiatives* | From the Center for Work & Family, this manual provides a variety of articles addressing needs assessment, benchmarking, evaluation of programs, etc. |
| Koppes, L. L. (2008). Facilitating an organization to embrace a work-life effectiveness culture: A practical approach. *The Psychologist-Manager Journal, 11*, 163-184. | Article outlining experiences of working with organizations on work-life effectiveness culture. Includes step-by-step process for working toward work-life effectiveness culture. |
| *Work & Life Balance Certification* | Management tool by the European Institute of Social Capital to improve work & life balance of organizations. Establishes 19 programs or initiatives in 7 categories that an organization must achieve for certification. |
| *Family Friendly Workplace Certification* | United Way St. Croix Valley's initiative to encourage family friendly policies in the workplace. |

Benefits:
● Increases likelihood of utilizing existing policies
● Increases likelihood of improved life satisfaction for employees
● Decreases costs associated with negative employees behaviors (e.g., increased turnover, increased medical claims, increased absenteeism, decreased organizational commitment)
● Results in culture change that supports life balance

Costs/Disadvantages:
● Increases costs due to increased utilization of existing policies

- Increases costs associated with training, socialization, and development
- Increases costs associated with organizational change (e.g., turnover of supervisors who cannot adapt to the new culture)

# Obstacles to Change

As with any broad scale change there are inevitable barriers to progress. Here we define barriers to be those things that do or may limit an individual, unit, or the University from offering, implementing, using, practicing, or providing some benefit or service that could contribute to a more positive work and life balance for an employee. In reviewing the existing policies and imagining what a new campus model might look like, the study group identified five barriers to either culture change or the implementation of new or improved life balance policies.

1) Statutory

The University is constrained in some measure by the limits of state statute and the willingness of the state legislature to grant additional powers and responsibilities to the individual campuses. Wisconsin Statute 40.03 *Powers and Duties of Employee Trust Funds Board* requires the Group Insurance Board to approve all benefit plans that have premiums deducted via payroll deductions. This limits individual institutions from negotiating plan features that the campus might support but that are not supported by the Group Insurance Board (e.g., fertility treatment for same sex couples.) Similarly, Wisconsin Statute 40.70 - *Life Insurance Coverage* requires the Group Insurance Board to approve all insurance plans, thus limiting the institution's ability to seek alternative options for our employees.

2) UWS Policy/Regulations

UW System rules also impose constraints or limitations on the flexibility of UW Oshkosh policy. For example, the System outlines guidelines for telecommuting. University of Wisconsin System 18.08 - Personal Conduct Prohibitions constrains personal conduct that might improve life balance such as the ability of employees to bring pets into state buildings and onto state grounds. UW System's Catastrophic Leave Policy outlined in UPS Operational Policy: BN 5, July 1, 2015 prohibits employees from donating sick leave or compensatory time to employees with a need for additional time off due to a catastrophic medical issue.

3) UW Oshkosh Policy

While many of the rights and benefits regarding life balance are codified in the UW Oshkosh Faculty and Academic Staff Handbook, the handbook itself is sometimes poorly written, contradictory, or insufficient to the task of laying out a complex policy. Specifically, processes related to FLSA, FMLA, sick leave, colleague coverage, and compensatory time off are opaque. Some expressed concerns that the handbook is not being properly referenced, interpreted, and/or implemented by their supervisor and/or by the administration itself.

4) Fiscal

Perhaps the greatest threat to life balance on the UW Oshkosh campus is the uncertainty and scarcity of financial resources. The systemic budget pressures lasting over at least a 10-year period have resulted in a) staff reductions without corresponding work reductions, b) stagnant staffing and development to ensure the right mix of job skills and abilities to keep up with ever-changing technology, c) a compensation strategy to

lag the market (i.e., consistently pay below market average wages) that results in low morale and high turnover, putting further pressure on employees, and d) the institution's inability to invest in facilities and programs that would specifically improve life balance for employees. Combined with increasing and regressive costs of fringe benefits, employees have seen a decline in their standard of living. It's not uncommon for employees to mitigate these losses by taking on overloads or holding second jobs outside the UW System.

5) Campus Culture and Leadership

As with any significant cultural shift, the current campus culture and leadership may present a barrier to change. Among employees, there may be a lack of knowledge or understanding of what work and life balance support is available to employees and what recourse employees have when they're denied access to certain benefits. Many employees reported experiencing a culture where it is expected they will "do more with less," regardless of the cost. Some people reported that they feel defeated and have come to not only accept but resent that this is just the way things are at UW Oshkosh.

On the other hand, many respondents to our second survey indicated that supervisors and unit leaders seem out of touch and ill-prepared to deal with what is happening in the day-to-day lives of their employees. Supervisors feel they are not adequately prepared to manage staff scheduling, predict and allocate workload, budget resources, manage unit conflicts, and interpret policy related to work and life balance. Employees feel that certain life balance benefits (e.g., flexible work hours) are withheld for no apparent reason or applied inconsistently across employees. In some cases there is the feeling that administration is more concerned with protecting itself than with responding to employee needs.

# Conclusion

The University of Wisconsin Oshkosh is well-situated to offer its employees the opportunity to lead balanced lives, allowing for healthy relationships, positive physical and mental states, intellectual growth and work fulfillment, financial stability, and holistic self-actualizations to its employees. We have identified a myriad of best practice life balance policies that are already on the books, available to university employees. In addition, according to SmartAsset (2016), Oshkosh was rated as number 7 on the list of Top 10 Cities for Working Parents after ranking 446 cities across America on their desirability for working parents. Using measures such as unemployment rate, number of workweeks, violent crime, cost of housing, commute time, childcare costs, and graduations, SmartAsset concluded that the City of Oshkosh has a lot to offer working parents.

Unfortunately, repeated budget cuts over the past 10 years have deteriorated the reality of life balance for university employees. Decreased staffing, increased turnover, lower real income, and long, odd work hours have become the norm. While employees are not ungrateful for attempts at salary equity, they perceive little progress toward pay equity, manageable workloads, and improved morale. Further, employees expressed a great deal of skepticism in the validity of our study efforts, underscored by their concerns about leadership's willingness and ability to reengineer our current culture of long hours, understaffing, unrealistic workloads, and inequitable practices.

Should the campus commit to Options 2, 3, or 4, coordination among campus governance groups, administrators, and human resources will be essential as policy change and implementation will be needed. The needs assessment has already been conducted by way of this analysis. Thus, future steps might

roughly follow the guidelines set in *The Link* (CWF, n.d.), which could also be a useful roadmap to follow in the develop of campus life balance culture:

1. Create a vision statement and goals for the institution's commitment to life balance.
2. Develop key performance indicators associated with the goals of a life balance initiative.
3. Assess the current state against the vision statement and goals (much of the work we have done in this report could be used for this assessment).
4. Identify what stage we are at in the progression to work-life balance effectiveness.
5. Prioritize life balance initiatives.
6. Evaluate current uptake or utilization rates of existing policies.
7. Develop a decision-making rubric.
8. Estimate return on investment of various initiatives.
9. Understand UW System and state law regarding various initiatives.
10. Identify factors that might impede or encourage development of policies and practices.
11. Identify differences in stakeholder perceptions about life balance and the workplace.
12. Identify challenges that these perceptions might pose for progress.
13. Develop the business case for life balance initiatives (keeping in mind the need to communicate to different stakeholders).
14. Form a project management spreadsheet outlining timeline for changes and additions for each initiative, assigning responsible parties, deadlines, etc. necessary for progress.

Our campus has a unique opportunity to brand UW Oshkosh as a family-friendly workplace in a family-friendly city. Further, excelling in this area is consistent with our campus commitment to sustainability as the outcomes that follow (better health and wellness, lower alcohol and addiction rates, and higher organizational performance, etc.) are essential for creating a sustainable community.

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## Appendix A - UW Oshkosh Policy Summary

| POLICY | POLICY HIGHLIGHTS | SOURCE | PRACTICE NOTES | FINDINGS AND CONCERNS |
| --- | --- | --- | --- | --- |

| POLICY | POLICY HIGHLIGHTS | SOURCE | PRACTICE NOTES | FINDINGS AND CONCERNS |
|---|---|---|---|---|
| *Onsite daycare* | Children's Learning and Care Center on campus available for staff and students. Fees charged. | UW Oshkosh Website | Flexibility is given to change schedules on demand but not written into the policy itself. | Cost is too high and spots are uncertain due to changing schedules; access year-round |
| *Children in the Workplace* | UW Oshkosh is currently drafting a university-wide Children in the Workplace Policy | https://www.wisconsin.edu/general-counsel/download/child_safety/Sample-Policy-on-Children-in-the-Workplace.pdf | Informally, some departments let staff have their children at work while the staff are working. Some departments do not allow this. Creates disparity and potential conflict or distraction. | Could reduce work/life balance for faculty. After an initial draft that was met with criticism, UWO created a committee that wrote a draft policy modeled after UW Madison's policy: https://kb.wisconsin.edu/images/group171/62470/598A-PolicyonChildrenintheWorkplace.pdf |
| *Tuition reimbursement* | Eligible employees include Academic Staff half-time or greater appointment and University Staff with a permanent or project appointment. LTE, employees in training (and students) not eligible. Course must provide skill or knowledge that will improve employee's job performance. There is a form to fill out and submit to HR prior to start of course. Must be reviewed and approved or disapproved through all administrative levels. Documentation must be provided after course before reimbursed. Certain grades must be achieved. Only tuition is reimbursable; books, supplies, travel are not. | UW Oshkosh Faculty and Academic Staff Handbook. UW System policy. | This is subject to unit and/or division approval. Some units are able to provide this; some units have stopped offering/approving tuition reimbursement due to budget cuts. Some employees may try to transfer or seek jobs in departments that are able to offer it so they can take advantage of this opportunity. Individual departments may be using PR dollars to support this policy which creates inequities. | Compliance with the policy may not be tracked. Some departments cannot afford tuition reimbursement. |
| *On-site wellness clinics | Access to wellness services/features* | Healthy Titans is the umbrella name for multiple services/features available to employees from UW Oshkosh departments and partner organizations. Includes such things as fitness programs and facilities, Weight Watchers meetings, access to the SRWC, flu shot clinics, corporate discount for YMCA membership, others. | Healthy Titans | Defined as services/features that are not a direct benefit from an employee's health insurance plan. Some of these services/features are available to retirees and/or spouses, partners, children of employees. | Expand to include holistic wellness (e.g., yoga, meditation). Make Recreation and Wellness Center free. Treadmills and workout areas needed. |
| Well Wisconsin | Connects employees to discounts for wise food choices at grocery store. Discount on insurance costs. Employees provide health data. Provide health coaching services for exercise, food, health care choices. | "Well Wisconsin" is available to some employees through their insurance. | | |
| **POLICY** | **POLICY HIGHLIGHTS** | **SOURCE** | **PRACTICE NOTES** | **FINDINGS AND CONCERNS** |
| Mental Health Care | EAP. Health Insurance coverage. Counseling Center. | UW System | | |

| POLICY | POLICY HIGHLIGHTS | SOURCE | PRACTICE NOTES | FINDINGS AND CONCERNS |
|---|---|---|---|---|
| Long-term Disability Insurance | ETF. Part of employment. Considered for long-term after 9 months of disability. | UW System | | |
| Short-term Disability Insurance | One time waiting period (30 days or option 30-90-125-180 day). Provides up to 75% of compensation in the event of a short term disability or illness. Supplemental ICI is also available. | UW System | | |
| Lactation spaces | 6 areas available for lactation; no formal lactation policy; Lactation spaces must conform to state statutes for sanitation, security, and privacy. Federal guidelines for breastfeeding mothers: https://www.dol.gov/whd/nursingmothers/ | https://www.uwosh.edu/gec/resources/lactation-rooms | There is not a lactation space located in every building on campus. The Breastfeeding Policy of UW-Whitewater may be a model for us, because it sets up a process for requesting additional lactation space before returning to work. We don't currently have a formal process for requesting lactation accommodations. | Difficulty finding suitable, clean lactation spaces close to work station. |
| Leave policies | Employees can take FMLA for unpaid leave. Employees may use any accumulated paid leave such as sick leave, personal holidays and vacation days (if applicable) toward leave. Sick leave can be accrued even if an employee is on a paid leave of absence. Employees may request intermittent leave based on their work schedule at the discretion of their department chair or program director. Probationary faculty may request a stopping or suspending of the tenure clock according to the Faculty Handbook. | http://www.UWOshkoshsh.edu/provost/Main%20Highlight/handbooks/online-faculty-staff-handbook/general-personnel-materials-faculty-and-academic-staff/gen-3-employment-considerations/benefits/gen-3-b-6-family-leave | Lots of ambiguity around the rights of instructional academic staff. Inconsistency across campus in terms of accommodations, leading to unequal treatment and disparities. See "Family Policy Recommendations" in Articles and Resources folder for more detail. | Employees express frustration and confusion about options. |
| Retirement | Wisconsin's retirement program is considered one of the best in the country as it is fully-funded and a defined benefit plan through the Wisconsin Deferred Compensation program. | Wisconsin Retirement System | The University does a good job of providing resources to help employees understand their retirement, including the opportunity to meet with representatives on campus. | |
| Retirement Investment Fund | In addition, employees can elect to contribute additional earnings to a 403(b) or deferred compensation. | | Employee contributes to retirement fund (tax deferred). The university does not provide a matching contribution. | |
| POLICY | POLICY HIGHLIGHTS | SOURCE | PRACTICE NOTES | FINDINGS AND CONCERNS |
| Deferred Compensation Options | University provides an option for 457 deferred compensation. | | Employee contributes to deferred compensation. | |

| POLICY | POLICY HIGHLIGHTS | SOURCE | PRACTICE NOTES | FINDINGS AND CONCERNS |
|---|---|---|---|---|
| Post-retirement Employment; Rehired Annuitant | Employee can return to work at a state agency after certain period of time (usually after 75 days) and employment can last for only a certain amount of time (generally 1 yr). Time period based on whether employee will be WRS-eligible with the new employer. No restrictions on private employment after retirement or if rehire to a state agency is on a competitive basis. | Handbook, HR, UWS, and ETF policies. | Return to employment after break-in-service is not to be negotiated until after the break-in-service period. Likely informal/unofficial discussions occur before hand. This benefit could be defined more broadly as a placement/career exploration service for those who want to seek employment after WRS retirement. | http://etf.wi.gov/faq/retirees.htm#19 http://etf.wi.gov/news/ht-act20faqs.htm |
| Part-time faculty | There is currently no provision to allow faculty to partially retire and still take retirement benefits. Employees can work part-time as a way to move toward retirement. | https://www.UWOshkoshsh.edu/provost/Main%20Highlight/handbooks/online-faculty-staff-handbook/general-personnel-materials-faculty-and-academic-staff/gen-3-employment-considerations/benefits/gen-3-b-21-policy-on-post-retirement-employment | Faculty may be allowed to go part-time but they cannot collect benefits and they tie up a tenure line when they do this (i.e., the college is not allowed to hire tenure-track to replace the part-time loss.) | |
| Flexible work arrangements | Allows flextime, variable hours, nonstandard workweek, permanent part-time, and job sharing options | https://www.wisconsin.edu/ohrwd/uwsa/download/policy/alt-work-patterns.pdf | Disallowed in many situations; inconsistent application across supervisors. Need to be fully approved by HR. | Employees desire more consistent application, more lenient application, nontraditional start/end times, compressed workweek, extended lunch hours. |
| Telecommuting | Request to telecommute form on HR website. Form asks days, work hours, designated work area at home. Some of the expectations outlined in the form/letter include agreeing to attend meetings in person or via teleconference, submitting timesheets, leave time must be approved, all work rules apply, employee responsible for all additional costs (utilities, phone, internet, etc), proof of notification of insurer for homeowner insurance and that it is adequate to cover telecommuting. | https://www.uwosh.edu/hr/forms/telecommunication-agreement/view | Some departments/positions utilize this option. Does not seem to be a broadly available option on campus. No formal policy. | Employees express desire for more telecommuting option, greater consistency in application, greater availability to employees. |
| POLICY | POLICY HIGHLIGHTS | SOURCE | PRACTICE NOTES | FINDINGS AND CONCERNS |
| Academic Staff/Faculty Conversions | Allows conversions from academic staff to faculty and from faculty to academic staff. Must be approved | http://www.UWOshkoshsh.edu/provost/Main%20Hi | Seems underutilized, especially for staff to faculty. There are some long-term instructional | |

| POLICY | POLICY HIGHLIGHTS | SOURCE | PRACTICE NOTES | FINDINGS AND CONCERNS |
|---|---|---|---|---|
| | through dept/unit and up administrative channels. | ghlight/handbooks /online-faculty-staf f-handbook/acade mic-staff/academi c-staff-chapter-fiv e/changes-in-app ointment/acs-5-3- conversions-betw een-academic-staf f-and-faculty | staff who are vital to this institution who have never been converted or given the option. | |
| Medical | There is a state statute that requires the Group Insurance Board to approve all benefit plans that will have premiums deducted via payroll deduction. S. 40.03 (6), Wis Stats, sets forth the GIB's Powers and Duties (specifically s. 40.03(6)(b) and (d), which assigns the GIB the authority to approve insurance plans other than health, life and ICI, as well as premiums and enrollment periods.) | S.40.03 | In the past, each state employer could decide which of the optional plans they wanted to offer to their employees. In March of 2015, the GIB took further action to make the offerings of the optional plans consistent amongst the Star agencies. ETF worked with the UW and UWHC to address the plans we have that are offered to only our employees and were allowed to continue those offerings. DOA will not allow any new optional benefit plans. | Faculty/staff can communicate concerns to UW System but have no control over policies. Faculty/staff may not be fully aware of the coverage on medical benefits.Not as much information about the insurance providers that faculty/staff would like. Could Senate set up site sharing experiences, differences with insurance companies. Consider a benefits ombudsperson. |
| Vision | The vision employee-pay-all plans must comply with the Optional Plan Guidelines as developed by ETF. | UW System | | Need for information sharing regarding vision providers in the area. |
| Dental | The dental plan must comply with the Optional Plan Guideline as developed by ETF. | UW System | | Need for information sharing regarding dental providers in the area. Expand coverage to help with cosmetic dentistry. |
| Reasonable Accommodations for Disability (ADA/Workers Compensation Accommodations) | Accommodations such as light duty, change in environment, change in hours, etc. are allowed in response to a short or long-term partial disability. | | | |
| Life Insurance | Individual and Family Group, State Group, UW Employees Inc., University Insurance Association (Academic Staff) and AD&D. Must enroll within an amount of time from hire except UIA and AD&D. All are term life policies. Range from $3000 to $101,000; some are tied to your salary. | WI state statute 40.70 for State Group | 5 options available | State Group info |
| POLICY | POLICY HIGHLIGHTS | SOURCE | PRACTICE NOTES | FINDINGS AND CONCERNS |
| Temporary Employees | UW Oshkosh references LTE in terms of office support. | | Limited Appointment and Limited Term very distinct but | There is currently practice on campus that is contrary to the |

| POLICY | POLICY HIGHLIGHTS | SOURCE | PRACTICE NOTES | FINDINGS AND CONCERNS |
|---|---|---|---|---|
| [formerly LTE] (Use of) | | | sometimes confused. New category of USTE seems to be previous LTE but clarification needed. Also see post-retirement employment above. | policy of LTE where LTE are being used as permanent employees and not receiving benefits, vacation, etc. In addition, there are instances where LTE's should be hired but are not. |
| Catastrophic Leave | Help support employees who need to take an extended, unpaid leave of absence due to an illness or injury that incapacitates the employee or an immediate family member. It allows University employees to voluntarily donate unused vacation, banked leave/ALRA or personal/floating holidays to co-workers. Must exhaust personal leave. To donate you must be actively employed and have accrued leave credits available for donation. Donors must complete the Donor Authorization of Catastrophic Leave form. | UW Oshkosh HR website; UPS Operational Policy | An e-mail is sent out to all employees when someone is requesting this. Current policy does not allow for sick leave to be donated -- use it or lose it for vacation and personal holiday hours. VC on earning statement tells employee how much of their vacation expires on June 30th but this may not be well understood by employees. | Explain policy and circumstances in which it could be invoked. Include sick leave as an option to donate. Expand beyond catastrophic need. Set up exchange of sick leave/vacation. Pool leave for those on parental leave. |
| Pets in the workplace | Pets should be kept out of work spaces. Pets are restricted in and on univ property except as authorized by chief administrative officer. | WI Admin Code UWS 18.08; St of WI Telecommuting Guidelines 2000 | Poses possible safety issues, allergies, etc. | |
| Accidental Death & Dismemberment | Accidental death and dismemberment insurance for employees and their spouses or domestic partners and eligible children. Coverage levels range from $25,000 to $500,000. Includes: Zurich Travel Assist – travel assistant program. Surviving family benefits. Benefits for covered injuries including home alteration and vehicle modification benefits, hearing aid benefit, and therapeutic counseling benefits. Additional benefits paid in certain situations such as carjacking and natural disaster. Family coverage continues premium-free for one year after death. Continuation of group policy coverage at retirement. Conversion of coverage to an individual policy at the end of employment. | UW System | Optional for employees. Can apply for it at any time. | May need to increase education regarding the benefits covered under this policy. |
| POLICY | POLICY HIGHLIGHTS | SOURCE | PRACTICE NOTES | FINDINGS AND CONCERNS |

| Employee Assistance Programs | Counseling Center: Program is free, and any subsequent referrals to community agencies are often covered by the employee's health insurance. Services are specific to faculty and staff employed by UW Oshkosh. Support consists of consultation and case management services. Enrichment consists of the special programming, campaigns and special events for employees. | http://www.uwosh.edu/eap/about-us/mission-policy-goals | Data on how many employees use these services? Are chairs informed about these services and referring employees to the EAP? Do employees know about these services? |

# Appendix B - Frequency of Ranking for Survey 1 Questions

| Rank | Caretaking Responsibilities | Benefits | Professional Development | Retirement | Working Conditions |
|---|---|---|---|---|---|
| 1 | 78 | 82 | 36 | 16 | 128 |
| 2 | 71 | 100 | 62 | 42 | 64 |
| 3 | 53 | 86 | 71 | 75 | 54 |
| 4 | 51 | 58 | 100 | 92 | 37 |
| 5 | 87 | 13 | 69 | 112 | 56 |
| Total number of responses | 340 | 339 | 338 | 337 | 339 |

**Caretaking Responsibilities**. This includes: Leave Policy (for childbirth or adoption), Flexible Work Schedule, Onsite Daycare, Lactation Spaces, Sick Child Care, Children in the Workplace, Pets in the Workplace, Elder Care.

**Benefits**. This includes: Medical, Dental, Mental Health, Long-term Disability, Short-term Disability, Life Insurance, Disability Accommodations, Catastrophic Work Leave, Wellness Clinic, Well Wisconsin, Death and Dismemberment, and Employee Assistance Programs.

**Professional Development**. This includes: Tuition Reimbursement and Resources for Workshops and Conferences.

**Retirement**. This includes: Retirement Investment Fund, 457 Wisconsin Deferred Compensation, 403b Tax Sheltered Retirement Plans, and Post-Retirement Rehired Annuitant.

**Working Conditions and Arrangements**. This includes: Online Faculty, Part-time Faculty, Flexible Work Arrangements, Telecommuting, Spousal Placement, Academic Staff to Faculty Conversions, Overtime and Comp-time, Alternate Teaching and Research Tracks, Limited Term Employees, and Fees.

# Appendix C - Frequency Distributions for Survey 2 Questions

| Please indicate the extent to which work-life balance challenges cause you to experience dissatisfaction with the following areas of your life. | | | | | | |
|---|---|---|---|---|---|---|
| **Response** | **Strongly disagree** | **Disagree** | **Neither** | **Agree** | **Strongly Agree** | **Total Responses** |
| **Physical Health** | 10.47% | 15.21% | 17.96% | 40.40% | 15.96% | 401 |
| **Mental Health** | 12.25% | 23.25% | 16.5% | 36.00% | 12.00% | 400 |
| **Career** | 14.25% | 21.25% | 20.75% | 24.50% | 9.25% | 400 |
| **Relationships** | 29.75% | 30.25% | 21.25% | 24.00% | 3.75% | 400 |
| **Financial Health** | 15.96% | 20.70% | 17.21% | 30.42% | 15.71% | 401 |
| **Intellectual Health** | 24.44% | 37.16% | 18.70% | 15.46% | 4.24% | 401 |
| **Holistic Health** | 21.00% | 34.00% | 23.00% | 15.50% | 6.5% | 400 |

| Please indicate the extent to which you agree or disagree with the following statements. | | | | | | |
|---|---|---|---|---|---|---|
| **Response** | **Strongly disagree** | **Disagree** | **Neither** | **Agree** | **Strongly Agree** | **Total Responses** |
| **We are experiencing staffing shortages in my unit.** | 4.47% | 18.36% | 21.34% | 33.25% | 22.58% | 403 |
| **My workload has increased significantly the past few years.** | 1.49% | 10.42% | 21.84% | 36.23% | 30.02% | 403 |
| **My compensation has not kept my standard of living.** | 2.48% | 17.33% | 22.28% | 29.46% | 28.47% | 404 |
| **We are experiencing low morale in our unit.** | 1.99% | 13.68% | 20.15% | 31.34% | 32.84% | 402 |
| **I am expected to be available for work at night and on weekends** | 13.90% | 19.60% | 15.14% | 31.51% | 19.85% | 403 |
| **I am expected to check e-mail even when I am not at work.** | 12.41% | 21.09% | 14.39% | 30.02% | 22.08% | 403 |
| **I often work more than 40 hours a week.** | 9.18% | 13.65% | 11.17% | 27.30% | 38.71% | 403 |
| **My supervisor is flexible about alternate work arrangements...** | 6.50% | 9.00% | 24.25% | 39.75% | 20.50% | 400 |
| **I am often frustrated with leadership on campus.** | 3.23% | 21.34% | 29.78% | 31.27% | 14.39% | 403 |
| **I am often frustrated with my colleagues.** | 11.66% | 34.74% | 26.55% | 18.86% | 8.19% | 403 |

| Please indicate the strength of agreement with each of the following statements. | | | | | | |
|---|---|---|---|---|---|---|
| Response | Strongly disagree | Disagree | Neither | Agree | Strongly Agree | Total Responses |
| I am satisfied with the benefits at UW Oshkosh. | 2.98% | 17.37% | 23.33% | 46.15% | 10.17% | 403 |
| I am frustrated with the rising cost of benefits. | 1.00% | 7.21% | 21.14% | 42.54% | 28.11% | 402 |
| I am satisfied with benefits communication. | 6.23% | 15.46% | 21.45% | 44.89% | 11.97% | 401 |
| I am able to balance work with caretaking responsibilities | 2.01% | 20.60% | 36.43% | 38.19% | 2.76% | 398 |
| I have been able to add a child to my family without negatively affecting work | 5.70% | 12.44% | 66.06% | 12.69% | 3.11% | 386 |
| I was able to take at least 6 weeks off after the birth or adoption of a child. | 7.41% | 6.08% | 70.11% | 10.58% | 5.82% | 378 |
| It is possible for me to combine work with care of elders. | 4.23% | 12.43% | 62.43% | 18.78% | 2.12% | 378 |
| It is possible to combine work with care of someone with medical challenges. | 3.72% | 10.90% | 67.29% | 15.43% | 2.66% | 376 |
| It is possible to combine work with care of someone other than children or parents. | 4.03% | 7.80% | 79.03% | 8.60% | .54% | 372 |

| If you have experienced staffing shortages, increased workload, insufficient compensation and/or low morale, what do you attribute these circumstances to? Choose all that apply. | | |
|---|---|---|
| Response | Percent | Count |
| Budget Cuts | 82.88% | 305 |
| Poor resource allocation decisions by management | 36.41% | 134 |
| Inadequate work policies and practices | 29.35% | 108 |
| Technological changes | 12.77% | 47 |
| Other | 28.80% | 106 |

| #   | Answer                                      | %      | Count |
| --- | ------------------------------------------- | ------ | ----- |
| 1   | University Staff                            | 27.25% | 109   |
| 2   | Professional Academic Staff                 | 29.00% | 116   |
| 3   | Faculty                                     | 27.75% | 111   |
| 4   | Instructional Academic Staff                | 9.25%  | 37    |
| 5   | Limited Term Employee/Project Appointment   | 3.25%  | 13    |
| 6   | Administrator                               | 0.75%  | 3     |
| 7   | Other                                       | 2.75%  | 11    |
|     | Total                                       | 100%   | 400   |

| #   | Answer                             | %      | Count |
| --- | ---------------------------------- | ------ | ----- |
| 1   | College of Letters and Science     | 28.57% | 112   |
| 2   | Student Affairs                    | 15.05% | 59    |
| 3   | College of Education               | 9.69%  | 38    |
| 4   | Provost's Office/Academic Affairs  | 9.18%  | 36    |
| 5   | Administrative Services            | 6.38%  | 25    |
| 6   | College of Business                | 6.12%  | 24    |

| #   | Answer                       | %      | Count |
| --- | ---------------------------- | ------ | ----- |
| 7   | College of Nursing           | 4.85%  | 19    |
| 8   | Foundation and Achievement   | 2.04%  | 8     |
| 9   | Office of the Chancellor     | 1.02%  | 4     |
| 10  | Other                        | 17.09% | 67    |
|     | Total                        | 100%   | 392   |

| # | Answer | % | Count |
|---|--------|-----|-------|
| 1 | Part-time | 11.25% | 45 |
| 2 | Full-time | 88.75% | 355 |
| | Total | 100% | 400 |

| # | Answer | % | Count |
|---|--------|-----|-------|
| 1 | Not Applicable. | 67.72% | 258 |
| 2 | Adjunct | 4.46% | 17 |
| 3 | Assistant Professor | 8.14% | 31 |
| 4 | Associate Professor | 8.92% | 34 |
| 5 | Full Professor | 10.24% | 39 |
| 6 | Administrator | 0.52% | 2 |
| | Total | 100% | 381 |

| # | Answer | % | Count |
|---|--------|-----|-------|
| 1 | 19-25 | 4.27% | 17 |
| 2 | 26-35 | 17.09% | 68 |
| 3 | 36-45 | 25.88% | 103 |
| 4 | 46-55 | 29.65% | 118 |
| 5 | 56-65 | 19.60% | 78 |
| 6 | 66-75 | 3.27% | 13 |
| 7 | 76 and older | 0.25% | 1 |
| | Total | 100% | 398 |

| # | Answer | % | Count |
|---|---|---|---|
| 1 | Cisgender Male | 25.94% | 103 |
| 2 | Cisgender Female | 70.53% | 280 |
| 3 | Non-binary | 0.76% | 3 |
| 4 | Transgender man | 0.00% | 0 |
| 5 | Transgender woman | 0.00% | 0 |
| 6 | Other | 0.25% | 1 |
| 7 | Prefer not to say | 2.52% | 10 |
| | Total | 100% | 397 |

| # | Answer | % | Count |
|---|---|---|---|
| 1 | Heterosexual | 92.37% | 363 |
| 2 | Asexual | 0.51% | 2 |
| 3 | Bisexual/pansexual/polysexual | 1.78% | 7 |
| 4 | Gay | 1.53% | 6 |
| 5 | Lesbian | 1.78% | 7 |
| 6 | Queer | 0.25% | 1 |
| 7 | Questioning | 0.76% | 3 |
| 8 | Other | 1.02% | 4 |
| | Total | 100% | 393 |

| # | Answer | % | Count |
|---|---|---|---|
| 1 | White or European American | 93.00% | 372 |
| 2 | African American, Afro-Caribbean or Black | 0.50% | 2 |
| 3 | African | 0.00% | 0 |
| 4 | Hispanic or Latino | 1.25% | 5 |
| 5 | Jewish | 1.00% | 4 |
| 6 | Native American/Alaska Native/First Nations | 0.25% | 1 |

| #  |                                      |        |     |
|----|--------------------------------------|--------|-----|
| 7  | Asian                                | 0.75%  | 3   |
| 8  | Hmong                                | 0.00%  | 0   |
| 9  | Indian (subcontinent)                | 0.00%  | 0   |
| 10 | Southeast Asian                      | 0.25%  | 1   |
| 11 | Middle Eastern                       | 0.00%  | 0   |
| 12 | Native Hawaiian or Pacific Islander  | 0.25%  | 1   |
| 13 | Other                                | 0.50%  | 2   |
| 14 | Prefer not to reply                  | 3.75%  | 15  |
|    | Total                                | 100%   | 400 |

| #  | Answer                        | %      | Count |
|----|-------------------------------|--------|-------|
| 1  | No children                   | 28.35% | 112   |
| 2  | No dependents                 | 16.71% | 66    |
| 3  | Co-parent with partner/spouse | 42.53% | 168   |
| 4  | Single parent                 | 3.29%  | 13    |
| 5  | Expecting parent              | 1.01%  | 4     |
| 6  | Adult children                | 17.97% | 71    |

| #  |                                                                                      |        |     |
|----|--------------------------------------------------------------------------------------|--------|-----|
| 7  | Caring for parents or other older relatives                                          | 17.97% | 71  |
| 8  | Caring for individuals other than children or older relatives                        | 4.05%  | 16  |
| 9  | Caring for individuals with serious medical challenges  (e.g. cancer, dementia, etc.) | 5.82%  | 23  |
|    | Total                                                                                | 100%   | 395 |

| # | Answer | % | Count |
|---|---|---|---|
| 1 | Single | 13.13% | 52 |
| 2 | Partnered | 8.33% | 33 |
| 3 | Married | 73.23% | 290 |
| 4 | Separated | 0.51% | 2 |
| 5 | Divorced | 3.28% | 13 |
| 6 | Never married | 0.25% | 1 |
| 7 | Partner/spouse deceased | 1.26% | 5 |
| | Total | 100% | 396 |

| # | Answer | % | Count |
|---|---|---|---|
| 1 | Active Duty | 0.29% | 1 |
| 2 | Reserves | 0.00% | 0 |
| 3 | National Guard | 0.29% | 1 |
| 4 | ROTC | 0.29% | 1 |
| 5 | Veteran/Retiree | 3.23% | 11 |
| 6 | Veteran/Retiree with service connected disability | 0.00% | 0 |
| 7 | Civilian: No military service record | 92.38% | 315 |
| 8 | Prefer not to identify | 3.52% | 12 |
| | Total | 100% | 341 |

**Time of Military Service**

| # | Answer | % | Count |
|---|---|---|---|
| 1 | 1975-1990 | 42.86% | 6 |
| 2 | 1990-2001 | 42.86% | 6 |
| 3 | 2001-present | 14.29% | 2 |
| | Total | 100% | 14 |

# Appendix D - Summary of Survey Results by Demographic Categories

The following key is used for all of the tables in this appendix:

**All**=All respondents.

**Gender Identity**: M=Male respondents. F=Female respondents. GM= gender minority.

**Race/Ethnicity**: Wh=White. POC=People of Color.

**Occupational Category**: US= University Staff. PAS= Professional Academic Staff. Fac=Faculty. IAC=Instructional Academic Staff. LTE=Limited Term Employees. Adm.=Administrators. OJ=Other job.

**Sexual Preference:** Het=Heterosexual. SM=Sexual Minority.

Please indicate the extent to which Work Life Balance challenges cause you to experience dissatisfaction with the following areas of your life. [# indicates % Strongly Agree + Agree]

|  | All (407) | M (103) | F (280) | GM (14) | Wh (369) | POC (18) | US (109) | PAS (116) | Fac (111) | IAS (37) | LTE (13) | Adm (3) | OJ (11) | Het (363) | SM (30) |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Physical | 56% | 36% | 63% | 72% | 55% | 67% | 50% | 71% | 58% | 49% | 46% | 33% |  | 55% | 74% |
| Mental | 48 | 41 | 49 | 57 | 48 | 34 | 46 | 49 | 50 | 54 | 38 | 0 |  | 45 | 73 |
| Career | 44 | 43 | 43 | 50 | 43 | 39 | 44 | 43 | 45 | 46 | 31 | 0 |  | 43 | 47 |
| Relationships | 28 | 28 | 28 | 21 | 28 | 17 | 19 | 27 | 36 | 32 | 23 | 0 |  | 26 | 43 |
| Financial | 46 | 42 | 47 | 79 | 44 | 67 | 66 | 39 | 39 | 54 | 62 | 0 |  | 45 | 67 |
| Intellectual | 20 | 17 | 21 | 21 | 19 | 28 | 20 | 15 | 23 | 24 | 38 | 0 |  | 20 | 20 |
| Holistic | 23 | 18 | 23 | 36 | 21 | 28 | 18 | 20 | 30 | 28 | 8 | 0 |  | 21 | 30 |

Please indicate the extent to which you agree or disagree with the following statements.
[# indicates % Strongly Agree + Agree]

|  | All | M | F | GM | Wh | POC | US | PAS | Fac | IAS | LTE | Adm | OJ | Het | SM |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| We are experiencing staffing shortages in my unit | 56 | 60 | 52 | 71 | 55 | 78 | 61 | 55 | 60 | 43 | 15 | 67 |  | 56 | 57 |
| My workload has increased significantly in the last few years | 66 | 65 | 66 | 79 | 66 | 67 | 70 | 66 | 78 | 46 | 8 | 67 |  | 66 | 67 |
| My compensation has not allowed me to maintain my standard of living | 58 | 55 | 57 | 93 | 57 | 50 | 68 | 48 | 54 | 70 | 31 | 33 |  | 57 | 63 |
| We are experiencing low morale in my unit | 64 | 67 | 61 | 77 | 61 | 72 | 61 | 57 | 80 | 59 | 48 | 33 |  | 63 | 67 |

If you have experienced staffing shortages, increased workload, insufficient compensation, and/or low morale, what do you attribute these circumstances to? [% agreement]

| | All | M | F | GM | Wh | POC | US | PAS | Fac | IAS | LTE | Adm | OJ | Het | SM |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Budget cuts | 83 | 89 | 80 | 92 | 83 | 88 | 82 | 76 | 92 | 100 | 13 | 67 | | 83 | 79 |
| Poor resource allocation decisions by management | 36 | 36 | 36 | 54 | 37 | 29 | 36 | 42 | 32 | 45 | 13 | 0 | | 36 | 48 |
| Inadequate work policies and practices | 29 | 21 | 32 | 46 | 27 | 53 | 28 | 32 | 26 | 32 | 38 | 33 | | 29 | 34 |
| Technological changes | 13 | 13 | 13 | 0 | 12 | 24 | 8 | 13 | 17 | 6 | 13 | 0 | | 13 | 10 |
| Other | 29 | 17 | 32 | 46 | 29 | 41 | 29 | 26 | 32 | 16 | 50 | 33 | | 28 | 34 |

Please indicate the strength of agreement with the following statements about Working Conditions and Arrangements.
[# indicates Strongly Agree + Agree]

| | All | M | F | GM | Wh | POC | US | PAS | Fac | IAS | LTE | Adm | OJ | Het | SM |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| I am expected to be available for work on nights and weekends | 52 | 65 | 47 | 50 | 51 | 45 | 29 | 55 | 69 | 57 | 15 | 67 | | 50 | 67 |
| I am expected to check my work e-mail even when I am not at work | 52 | 63 | 48 | 43 | 51 | 61 | 22 | 41 | 85 | 78 | 31 | 67 | | 51 | 63 |
| My workload means I often work more than 40 hours a week | 66 | 77 | 62 | 57 | 65 | 78 | 32 | 72 | 93 | 73 | 23 | 67 | | 65 | 73 |
| The person in charge of my work schedule is flexible about alternate work arrangements | 61 | 66 | 59 | 50 | 60 | 61 | 59 | 55 | 65 | 65 | 62 | 67 | | 61 | 53 |
| I am often frustrated with leadership on campus | 45 | 43 | 44 | 64 | 44 | 56 | 44 | 44 | 50 | 43 | 38 | 33 | | 45 | 43 |
| I am often frustrated with my colleagues | 27 | 19 | 28 | 50 | 25 | 50 | 21 | 28 | 36 | 16 | 15 | 33 | | 26 | 30 |

Please indicate the strength of agreement with the following statements that concern Caretaking Responsibilities
[# indicates Strongly Agree + Agree]

| | All | M | F | GM | Wh | POC | US | PAS | Fac | IAS | LTE | Adm | OJ | Het | SM |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| I am able to balance work with caretaking responsibilities | 41 | 43 | 41 | 29 | 41 | 33 | 54 | 41 | 33 | 31 | 38 | 33 | | 41 | 30 |
| I have been able to add a child to my family through birth or adoption without negatively affecting my work responsibilities | 16 | 25 | 14 | 0 | 16 | 6 | 13 | 24 | 14 | 12 | 0 | 33 | | 17 | 3 |
| I was able to take at least 6 weeks off after the birth or adoption of a child | 17 | 4 | 22 | 8 | 17 | 11 | 12 | 20 | 18 | 15 | 8 | 0 | | 17 | 15 |
| It is possible for me to combine work with the care of parents or other older relatives | 21 | 17 | 22 | 25 | 22 | 6 | 18 | 25 | 19 | 13 | 31 | 0 | | 22 | 14 |
| It is possible for me to combine work with the care of someone with medical challenges | 18 | 20 | 17 | 25 | 18 | 6 | 20 | 21 | 16 | 13 | 15 | 0 | | 19 | 7 |
| It is possible for me to combine work with care of someone other than parents or children | 10 | 10 | 8 | 25 | 9 | 6 | 15 | 8 | 4 | 6 | 8 | 0 | | 9 | 11 |

Please indicate the strength of agreement with the following statements that concern Caretaking Responsibilities
[# indicates Strongly Disagree + Disagree]

| | All | M | F | GM | Wh | POC | US | PAS | Fac | IAS | LTE | Adm | OJ | Het | SM |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| I am able to balance work with caretaking responsibilities | 23 | 14 | 24 | 50 | 22 | 39 | 12 | 23 | 30 | 31 | 15 | 33 | | 21 | 37 |
| I have been able to add a child to my family through birth or adoption without negatively affecting my work responsibilities | 18 | 11 | 20 | 29 | 17 | 39 | 6 | 10 | 36 | 29 | 15 | 0 | | 17 | 31 |
| I was able to take at least 6 weeks off after the birth or adoption of a child | 14 | 25 | 9 | 31 | 13 | 28 | 3 | 7 | 30 | 24 | 8 | 0 | | 13 | 19 |
| It is possible for me to combine work with the care of parents or other older relatives | 16 | 14 | 17 | 17 | 16 | 31 | 12 | 14 | 21 | 22 | 23 | 33 | | 16 | 21 |
| It is possible for me to combine work with the care of someone with medical challenges | 15 | 11 | 15 | 0 | 13 | 29 | 9 | 11 | 17 | 25 | 31 | 0 | | 14 | 11 |
| It is possible for me to combine work with care of someone other than parents or children | 12 | 8 | 13 | 0 | 11 | 23 | 6 | 8 | 16 | 22 | 23 | 0 | | 12 | 7 |

What is your caretaking status? [% agreement]

| | All | M | F | GM | Wh | POC | US | PAS | Fac | IAS | LTE | Adm | OJ | Het | SM |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| No children | 28 | 28 | 29 | 15 | 29 | 24 | 36 | 31 | 17 | 24 | 46 | 0 | | 27 | 52 |
| No dependents | 17 | 17 | 17 | 23 | 17 | 6 | 22 | 16 | 12 | 22 | 15 | 0 | | 16 | 28 |
| Co-parent | 43 | 48 | 40 | 54 | 41 | 65 | 31 | 38 | 60 | 43 | 23 | 100 | | 44 | 31 |
| Single parent | 3 | 2 | 4 | 0 | 4 | 0 | 5 | 3 | 4 | 3 | 0 | 0 | | 1 | 0 |
| Expectant parent | 1 | 1 | 1 | 0 | 1 | 0 | 1 | 3 | 0 | 0 | 0 | 0 | | 1 | 0 |
| Adult child | 18 | 16 | 19 | 8 | 18 | 18 | 19 | 19 | 13 | 24 | 15 | 33 | | 19 | 3 |
| Caring for parents or other older relatives | 18 | 12 | 21 | 15 | 18 | 18 | 14 | 20 | 17 | 24 | 23 | 0 | | 18 | 10 |
| Caring for individuals other than children or older relatives | 4 | 3 | 4 | 8 | 4 | 0 | 7 | 4 | 2 | 3 | 0 | 0 | | 4 | 3 |
| Caring for individuals with serious medical challenges | 6 | 5 | 5 | 23 | 6 | 0 | 7 | 4 | 4 | 8 | 8 | 0 | | 6 | 10 |