



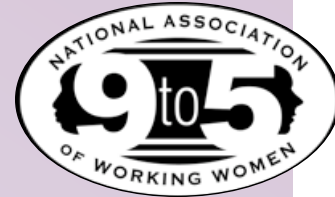
QUALITY PART-TIME OPTIONS IN WISCONSIN

*A Report by 9to5,
National Association
of Working Women*



About 9to5

9to5, National Association of Working Women was formed in 1973 to improve corporate and public policies affecting working women. The group has long been active on work-family policies through research, publications, first-person testimonies, media interviews and grassroots activity. 9to5 has offices in Milwaukee, Denver and Atlanta and members in every state.



About the Author

Ellen Bravo began working for 9to5, National Association of Working Women in 1982, when she helped found the Milwaukee chapter, and served for 11 years as its national director. She coordinates an 8-state consortium working on expanding family leave and teaches a masters level course on Family-Friendly Workplaces at the University of Wisconsin-Milwaukee. Among her publications is *The Job/Family Challenge: A 9to5 Guide (Not for Women Only)*, published by John Wiley and Sons. Ellen served on the bi-partisan Commission on Leave appointed by Congress to study the impact of the Family and Medical Leave Act on employers and employees. She is co-chair of the Economic Sufficiency Task Force of the Wisconsin Women = Prosperity project led by Lt. Governor Barbara Lawton.

This report was made possible by a generous grant from the Alfred P. Sloan Foundation. The report can be accessed in PDF format by going to the 9to5 website, www.9to5.org. It is also available on the Sloan website, www.sloan.org.

For more information or to order additional copies, contact

9to5

152 West Wisconsin Avenue, Suite 408

Milwaukee, WI 53203-2508

Phone: 414-274-0925

Fax: 414-272-2870

Email: 9to5@9to5.org

QUALITY PART-TIME OPTIONS IN WISCONSIN

A Report by 9to5, National Association of Working Women



Executive Summary

More and more employees need to manage work and family responsibilities. Others want time for education or community involvement or, especially later in life, for leisure activities. The result is an increasing number of people wanting or needing to reduce their work hours, at least for portions of their work lives.

9to5's three decades of experience as a non-profit serving working women, research by our staff and many others, and just plain common sense all point to the value of reduced hours for employees and their families. Yet in many cases, workers who choose this option pay a penalty in their rate of pay and benefits and in opportunities for advancement, losses they never make up during their career. Most people who are employed part-time still work full-time every hour on the job; in fact, many feel they produce more per hour because they are so motivated to make the arrangement work. As Dave Adam, Vice-President of Corporate Finance at Johnson Financial, put it, "My boss would say I accomplish as much or more as some full-time employees. You come in more refreshed to tackle what's in your in-box. The benefit to the employer is a dedicated employee who can focus on the effort at work."

What these employees seek are quality part-time options – a chance to work fewer hours at an equivalent hourly pay rate, at least pro-rated benefits and paid time off, and equal access to training and promotional opportunities.

An increasing number of employers offer such options in a variety of forms, including reduced work hours, job sharing, phased-in return from leave, and phased-out retirement. They do so not as a favor to women or to parents, but as a better way to do business.

In this study we set out to explore the business case for quality part-time options by presenting case studies of 15 employers in the state of Wisconsin. Our sample includes large and small companies, public and private, in a variety of locations. The employees profiled work in a wide range of positions, from entry-level to executive.



These are the advantages we heard over and over again for employers to provide quality part-time options:

- **Retention:** *almost every supervisor we spoke with mentioned the value of retaining talent and maintaining continuity of organizational know-how, along with saving the significant costs of replacing people and training new staff.*
- **Recruitment:** *these options help attract skilled and motivated employees, including those who are not looking to reduce hours at this point but are pleased to know the option exists.*
- **Morale, efficiency, productivity:** *all these increase when employees feel their employer has invested in them.*
- **Greater flexibility:** *employers we interviewed cited reduced hours options as helping them fill difficult weekend and evening slots.*
- **Improved customer service:** *the cross-training required to manage reduced hours can result in greater quality of care and service.*
- **Employee well-being:** *many employers count strong families and strong communities among their core values.*
- **Enhanced reputation in the community:** *employers benefit from being known as family-friendly.*

We also gathered important lessons about the best ways to manage these options. They include:

- **Assessment of business needs to ensure reliable coverage.**
- **Good communication between employee and manager and among employees.** *Everyone cited this as a key to success.*
- **Careful planning and goal-setting so that the employee's tasks are appropriate to the reduced schedule.**
- **Regular review to make sure the process is working for everyone.**
- **Creating a fair workload for other staff to avoid resentment and ensure good collaboration.**
- **Making the options clear and familiar in company material, with channels to appeal if necessary.**
- **Encouraging and training supervisors to be open to these options and manage them effectively.**
- **Monitoring supervisors to make sure they do manage effectively, and requiring specific plans on how to improve.** *That means linking success to key organizational measurements.*
- **Involving employees in resolving scheduling conflicts or other issues that may arise.**
- **Sending a clear message that employees are encouraged to use these options and urging all staff to achieve integration of work and personal life.**

As KPMG HR director Barbara Wankoff notes, “It’s just as critical there’s not another message coming out the day before or after saying, ‘Make sure your chargeable hours are up.’”

What’s critical to success, in short, is seeing quality part-time options not as fringe policies but as a key part of how work is done. In the words of GE’s Pat Pearman, “It’s not just how you design the time, but how you design the work environment.”

Respondents also identified health and retirement policy changes that would help promote quality part-time options. These include:

- **Lowering the cost of health insurance – and for some insurers, the rules -- to make it easier to offer to part-timers.**
- **Changes in Social Security to allow older workers to keep more supplemental income through earnings.**
- **Changes in pension plans to allow workers to reduce schedules in later years without harming their pensions.**

The employer representatives we surveyed all encouraged others to try these options. “[Not paying benefits to part-timers] may save some money in the short-term,” says Thrivent Financial’s Deb Palmer, “but in the long term it doesn’t provide a good value because of increased turnover and lack of internal knowledge. If you treat people as full-time but just at reduced schedule, they end up being more committed to the organization.” Or as Anne Wakeham, Director of Client Services at Covance, Inc., put it: “How can you not do it? It’s so easy.”

9to5 applauds the employers spotlighted in this report for implementing quality part-time options. It is our hope that this study will inspire other employers to consider offering quality part-time options, and will be of use to managers and employees seeking to implement similar policies at their own workplaces. We should note that our research is limited to the part-time policies highlighted and is not a comprehensive review of any of the companies profiled.

We are extremely grateful to the Alfred P. Sloan Foundation for their support of this project and of other research to help employers and employees manage work-life issues. Thank you to the many people we interviewed for their time and thoughtful observations. A special thanks to Leila Emami-Davis, our intern, for her persistence and effectiveness at identifying potential subjects. Thanks also to Dennis Dresang and Alison Wood at the LaFollette Institute for Public Policy at the University of Wisconsin-Madison, and to Linda Garcia-Barnard, Linda Meric, Sangita Nayak and Dana Wilson of the 9to5 staff, for their assistance with this report.

Ellen Bravo

***‘It’s not just how
you design
the time, but how
you design
the work
environment.’***



Beloit Memorial Hospital

Location: Beloit

Contact People: Kris Armann Director Human Resources, Connie Jones Communications Coordinator, Bonnie Scholko RN Nurse Recruiter

Total number of employees: 1050

Part-time employees: 467 part-time and on-call

Beloit is a community hospital founded in 1926.

Options Available

Beloit Memorial Hospital prides itself on offering three 12-hour shifts at 40 hours pay and 100 percent tuition reimbursement to RN employees who work 36 hours or more. "These shifts are a big satisfier to nurses," says Bonnie Scholko. "Other hospitals have this but they don't pay the extra 4 hours." Those who work 24 hours are paid for 26.

The hospital allows nurses to go up and down in their hours. "We can almost always find room for them to go back to full-time," Scholko says. The tuition reimbursement is also unique, allowing for full reimbursement as long as the study is in a related field and the recipient earns at least a B grade. The benefit has no cap, and is good at any college. Those who work fewer hours are still eligible on a pro-rated basis.

Health insurance is offered to anyone working at least 24 hours a week. The employee premium is the same whether they're part-time or full-time. Paid time off corresponds to the number of hours worked rather than those scheduled. Someone who's scheduled two 12-hour shifts and picks up extra hours will receive additional vacation and holiday time. "Many of them do pick up extra hours," Scholko says, "so this is really an advantage."

Another benefit is a \$100 educational stipend, which employees can use for items like journal subscriptions, textbooks, seminars. Even per diem staff (employees who are not regularly scheduled for any specific hours, but pick up hours when they want to and when needed) have access to that. They also have access to vacation, a pharmacy discount,

free sick child care 24 hours a day, and the fitness center. Some pharmacists, lab technicians, and even a foundation data entry staff choose to work just 10 hours a week. A job sharing option exists but is not common.

Many entry-level unionized workers like Certified Nursing Assistants (CNAs) work part-time to accommodate their school schedule. Typically someone might work second shift on a 24-hour schedule that includes every other weekend, with half the cost of tuition as a benefit. While part-time options have apparently always been available, vacation benefits for per diem employees began in 1985.

The policy is formal and available to all employees. It's described in a written policy manual given to every new employee as part of orientation, with a benefits sheets describing the specific breakdown according to the number of hours worked.

Management's View of the Benefits

"Nurses love working the 12-hour shift and being paid full-time or 24 hours with the extra 2 hours," says Scholko. "The downside is that 12 hours is a long day, but nurses like the idea of being able to drop down to part-time for a year or so and being able to go back up. That's worth a lot. People realize we're willing to do that – we can't always, but we try." As a result, the hospital vacancy rate for RNs is under 2%. Beloit Memorial's turnover rate globally was 14% for the year, compared to an industry average greater than 20%. Scholko says the benefits are also a "very successful recruiting tool."

Scholko points out one area where policy change would help. Right now, Social Security rules demand that older nurses cut back their hours or leave. "They would like to work more without losing Social Security," she says.

Advice for Other Employers

Scholko emphasizes the advantage of consistency in offering benefits for reduced schedules. "People can count on us," she says. "Some organizations keep changing policies; people don't know what they can trust. Not here. We've kept

these programs in place for a long time, through good times and bad. We have loyal employees because they know we'll still do this in five years. It's a good retention tool."

Employee Perspective

Doris Mulder is now the Vice President of Nursing. Previously she held the position of Director of the Family Care Center (OB and Pediatrics). She began working part-time as a staff nurse in the birthing center in 1986. Then a new position was created for a Clinical Manager in that unit; Mulder was promoted. She moved to full-time, but soon wanted to go back to school for her bachelor's degree in nursing. She was allowed to cut her schedule to 32 hours a week. Mulder was selected as one of two nurses to receive a scholarship that paid tuition in advance plus a \$2,000 stipend each year. After a year and a half, she graduated and went back to being Director of the Family Care Center full-time.

When my husband and I moved back to Wisconsin from Alabama, we had young children, two in pre-school. My husband is a full-time teacher. I really enjoy being a nurse, but my first goal was to be with my children. Being a nurse added flexibility. I worked 3 evenings a week, had wonderful insurance, paid vacation, time-and-a-half when I worked holidays – that was a great benefit to me. I had the flexibility of coming to work at 3 in the afternoon. Our children only had to have someone else caring for them for a couple hours, and my husband had the experience of being with them in the evening, putting them to bed and spending time with them one-on-one. As my kids got older, I was ready to come back full-time. I also wanted to go to school for a further degree in nursing. Working part-time then was a wonderful option. During summer, when my husband was not teaching, I was able to pick up hours and work full-time or beyond, accruing paid time off at that rate. It was very flexible, and I had input into how many hours I worked.

Working part-time as a Clinical Manager required strong communication and interaction skills with the whole leader-

ship team. On days I wasn't there, my department director would fill my roles in way she could. We made sure that between the two of us, other than in very unusual circumstances, one of us was there. Within the leadership team, we cover for each other. It works well if you just communicate and work together.

When I'm covering for one of my co-managers or peers, it makes me understand what their work responsibilities are like and the same is true when they cover for me. It means we're one hospital. The final product is quality in patient care. If I understand problems in radiology or another nursing unit, when a problem comes up, we'll solve it better than if we have tunnel vision because we only know the one area we work in.

In my field, nursing, which is 96 percent female, some women choose to work full-time throughout the career – it's right for them. But what we see more often is women who start their career after college and then take some time off when they have children. If we said they couldn't work here, we would lose some most excellent employees, many of whom come back full-time as their children get older.

Jim Ruthford, Internal Auditor, is phasing into retirement. He's been with the hospital since 1999 and is now 68. He plans to move from full-time to 48 hours every two weeks, retaining benefits, for another 5 years.

I'm reaching the point where I would like to curtail my work activities some, but I don't want to just stop. It's to my benefit to continue with that activity. My wife will retire at the end of this year. We have a lot of things we want to do including travel and other activities. We have family located in other parts of the country, and I am very involved in our church as a minister.

There are certain audits that are very critical to the hospital that need to be performed at a specific time. During that period, I will work full-time. I also do a lot of compliance audits but their timing can be more flexible.

My position pays for itself. There are a lot of things I do that identify uncollected funds, such as monitoring external audits by insurance companies requesting an adjustment to their claim. I have a degree

in accounting and a master's in business education and a military background. I have managed three different retail operations, chaired the accounting department of a business school, and taught accounting. I bring a lot of experience and diversity to the hospital. They're not going to get that easily in a new employee. So there is a significant benefit to them to utilize my experience on a part-time basis.

Some employers don't yet have the mindset for this arrangement. They would be wise to consider its benefits.

Covance, Inc.

Location: Madison

Type of company: Contract Research Organization

Contact Person: Anne Wakeham, Director of Client Services, Stephanie Kimball, Human Resources Generalist
Total Number of Employees: 1100-1200 employees in Madison, 6500 nationwide

Part-time Employees; 61 people - 48 women, 13 men. None of these is in a supervisory position.

Options Available

Part-time employees at Covance, Inc., enjoy the same insurance benefits as their full-time colleagues. Anyone who works 20 hours or more is eligible to receive full health, dental and life insurance. Vacation and other paid time off is pro-rated.

No document exists about when the benefits were introduced. "It was part of the company philosophy going back as far as anyone knows," says Anne Wakeham; the firm was founded in 1946. "It was seen as key to retaining employees, especially women with child care issues."

The philosophy has been evolving. Two years ago, for example, Client Services felt they couldn't accommodate part-time because of having to respond to customers calling in. As the new director for the department, Wakeham spent time reassuring staff that part-time could work, creating some basic parameters to make sure a customer could get in touch with someone, and setting a cap for part-time slots of ten percent of department staff. "Some ask, what if everyone wants to do it," says Wakeham. "It never happens."

But the guidelines address this concern. The new schedule also made coverage easier when someone is out.

The reduced hours option is formal, part of an official flexible work arrangement program that was rolled out three years ago to cover all alternative work arrangements. Each business unit sets up a procedure that defines what types of schedules their department can accommodate. Employees then submit a written request for a specific alternative schedule that is signed by the employee, supervisor, and HR representative.

According to Stephanie Kimball, employees make the case for their request based on business rather than personal need. "We're moving away from seeing it as just for new mothers," she said. "If we can accommodate it, we will. We don't ask what the reasons are."

One reason for creating a formal program and form, says Kimball, was hearing from employees who encountered resistance from their own managers. Under the new system, the employee completes an application, which goes to HR. The manager can't just say no, but has to give a written reason which HR will examine. "Most come back as yes," Kimball says. Employees may have to adjust the schedule slightly.

When the system is informal, Kimball points out, "You talk to someone, they may not really say no but roll their eyes, make you feel the request is unwelcome, so you don't bring it up again."

Some departments are still resistant, says Wakeham. But since they allow for a compressed work week, they could also accommodate someone working four hours a day. Wakeham's approach is to work with managers, show the possibilities. Some are reluctant because they're not able to envision how it will work, thanks to decades of experience doing it one way. The scientific teams have been slower than support teams to embrace something new.

What helps at Covance is being clear from the outset about expectations, including how to deal with absences due to illness or holidays. "My experience is people are very accommodating," says Wakeham. "They want to make it work out. We've always been able to work it out."

Management's View of the Benefits

Wakeham acknowledges that managing part-time options probably takes a little more time. "Job sharing means a double load in terms of coaching and performance reviews. It can be a handful to juggle flexible schedules. But it's a huge benefit to employees, so supervisors are willing to work on it." And the cost? "I have never heard anyone from supervisor up to VP who has said, how do we make up the money to pay for full-time benefits," Wakeham notes. "We're very cost conscious, but this has never this come up."

Because the lab has to follow regulations from governing bodies like the FDA, a great deal of training is involved – up to three months for many employees, six to nine months for higher level staff. "We understand the cost of a new employee," Wakeham says.

"This allows us to keep people we want to keep, good employees who have a history with the company and a relationship with our customers," Wakeham says. "I've found people usually want to go part-time for a while, then come back to full-time. We've maintained those employees and they feel good about the company. Everybody wins."

Advice for Other Employers

Kimball suggests employers "let it be successful in one or two groups and then show the rest of the company. They understand better when there is proof something works." Anticipate the responses and demonstrate the benefits to the department before you roll out the program. Get managers and supervisors involved and let them be part of the process, setting their own parameters for their group. "That gives a sense of control," Wakeham says. She has used this approach to introduce part-time and flex scheduling in several departments over the years.

At the same time, Kimball discourages requiring that a certain portion of the workforce work this way. "Let it happen first with people who are comfortable doing it," she urges. "Show others it's possible. It is a great way to add a benefit for your employees that does not cost out-of-pocket money to the employer."

Given the low unemployment rate in Dane County, Wakeham and Kimball see

these options as a key recruitment tool as well. Some people are looking just for part-time. They also see the full benefits package as a real selling point.

"How can you not do it?" asks Wakeham. "It's so easy."

Employee Perspective

Renee Smith is a Technical Training Coordinator at Covance. She's been with the company for 14 and a half years. When her daughter was born in 2001, Smith decided to reduce from full-time to three ten hour days.

My sister works part-time in the same department and we share day care. Without that it would be difficult for us financially and it allows us to keep child care within the family. That's been a major bonus for us.

Some days it's a challenge. Other days it's a motivation. You find ways to restructure your day. I come in extremely early, which allows me to do more than two hours of work uninterrupted. I'm not aware of any problem for co-workers. Communication is what's key, people knowing your availability. We have a back-up plan and back-up people for certain duties in the department anyway. We use departmental emails, and postings in a cubicle or on the main board to keep each other informed.

I don't know if I would have stayed if I couldn't have done this. It definitely would have come to the forefront. Our department has quite a few people on part-time or alternative schedule. It's worked out very well. I've worked with some folks who've said they wouldn't be here if they couldn't do their alternative schedule. There's a lot of family priority.

To other employers I'd say, this is worth it. A happy employee is a better employee.

'This is now an equal opportunity option for people across the board.'

GE Healthcare

Location: Waukesha (part of a global operation)

Contact Person: Pat Pearman, Global Manager of Diversity

Total number of employees: 44,000

Part-time: N/A

Options Available

GE offers an array of reduced hours options, including part-time, job share, compressed work week, and redesign of work environment. The options are well utilized for a variety of reasons. Any GE employees who work at least 20 hours a week receive regular fulltime benefits. "We don't distinguish," says Pat Pearman. "That's a huge positive. Whatever reasons someone goes part-time, they may still require equal benefit coverage." Time off is pro-rated based on the number of hours worked.

Pearman says these practices have been around for a long time at GE. They've especially evolved at GE Healthcare in the last three to four years because "it's smart business, it's how you get the competitive edge."

Quality reduced hours options are available to all employees at GE Healthcare. Part-timers are found at all different job levels and all locations. Interestingly, men constitute 40 percent of those taking advantage of the flexibility. "A large percentage of today's parents look to work reduced hours to ensure they are a part of their children's lives," Pearman says. She points out that many baby boomers are dealing with aging parents and other issues, or may need some time "to back away for a period of time to get re-energized. Flexible work is an equal opportunity option for employees across the board."

Managers' education about flexible options is made available through a global training program called Managing the 21st Century Workforce. Training modules cover topics ranging from measuring a manager's sensitivity to redesigning the workplace. The program gives real-life examples of models and outcomes, along with a business case rationale for productivity as well as retention.

Pearman wasn't able to give numbers on usage because often arrangements are worked out directly with employees and managers and "we don't know about

it,” unless someone is working 50 percent time or less.

To help decide which option would work best, employees and managers can access the internal Employer of Choice website, which has a Flexible Work Schedule module. “If you want to redesign your job,” Pearman says, “here are tools to help you through the entire process.”

In addition to the technical assistance, GE Healthcare has an internal Services Resource Unit. Pearman calls them “the alternative to an 800 number, when you want to talk to a human being. For the

‘It was a workaholic culture, but it changed for the better to keep people and recruit them.’

most part our managers are pretty good at this stuff – they know where to come for help if they need it.”

Employee input is regularly captured through GE’s annual CEO survey. The survey, conducted by an external company, is completely

anonymous. Employees have the opportunity to have their voice heard. The survey contains a number of questions about employee satisfaction with work-life issues. Pearman notes that GE Healthcare’s score has been steadily rising over the last couple years and is “one of the areas we do well in.”

Survey results are analyzed and each business unit is required to put together a plan to improve, which is tracked throughout the year.

Management’s View of the Benefits

“We see we’re in a very competitive global marketplace,” Pearman says. “We’re in the business of attracting and retaining the best talent. You have to think outside the box. This is a tool to help us help people through those points in their lives when they need some relief. Otherwise we force people to make decisions which can result in the loss of talent. In a high tech industry like Healthcare, you end up having to pay twice as much when you’re forced to replace domain knowledge required for our jobs.”

Advice for Other Employers

People sometimes ask about abuse. “If someone is abusing time,” Pearman says, “it’s going to show up in performance.” She also notes that abuse is infrequent “when you create an open culture where employees know flexible work options are available should they need it. You eliminate forcing employees into a corner where they feel the need to hide or lie about it.” Employers should not shy away from flexible work options because of fear of abuse.

Pearman thinks one key to managing flexible options is tying them to metrics. “We tied it to employee satisfaction. It’s a consistent measure across the entire business every year, and a major accountability for managers.”

Another key, according to Pearman, is looking at how to support people during the transition. “It’s not just how you design the time, but how you design the work environment. The old paradigm was career. The new paradigm is career cycle. We need to recognize that people have shifting priorities; there are many different things that can impact a person throughout that career cycle.”

Employees who have had successful GE careers and have used flexible work options map share their experiences with other employees. Pearman points to the value of this type of program when it comes to an employer’s reputation in the marketplace. “Good news travels fast, bad news travels faster,” she says. Companies who want to stay a step ahead of the competition recognize the importance of having flexible work options as a tool in recruiting and retaining the best and the brightest.”

Employee Perspective

Linda Pucek, Women’s Health Care Marketing Manager

About three years ago, my 5-year-old son had a lump. This was just before an annual trade show we all work feverishly on. We expected the biopsy to show a cyst, but it turned out to be cancer. When this happens, you’re just paralyzed. I called GE immediately to tell them I was out of commission and needed some time off.

My son had 52 weeks of chemotherapy and surgery. I was able to work from home for an entire year. They gave me non-time sensitive projects and I did

whatever I felt I could do at the time. I’ve always worked. I love to work – it was a great distracter and gave me a sense of normalcy. The other advantage was a cancer outreach program here. People involved called me throughout the entire process to check in on how I was doing.

I couldn’t wait to get back. My position was still there for me. They got people to cover while I was out. Unfortunately, six months later, my son relapsed and had to go through another 42 weeks of chemotherapy. He’s doing well now. And in August I was able to come back to a place I really love. I’m so dedicated to this place.

Every time we had to take our son in, people were amazed that both of us got to go. That was really important.

Six years ago flexibility wasn’t talked about as openly here as it is today. Before, the choice was made under the table. People didn’t want to say, I want a break. It was a workaholic culture - you didn’t want to let your guard down. But it’s changed for the better in order to keep people and to recruit them.

Johnson Financial Group

Location: Racine

Contact: Kelli Brownnewell

Total number of employees: about 1000

Part-time employees: about 180

Options Available

Johnson Financial Group has had a wide array of reduced time options since its founding in 1970. The financial services company considers a base schedule as 40 hours per week and measures anything less in five percent increments. Anyone working at 80 percent or more receives a full-time benefits package. Those at less than 80 percent receive a part-time benefit package: anyone who works 50 percent or more is eligible for paid time off, life insurance, a 401(k) and pension, and health insurance after one year (full-timers are eligible after thirty days of employment). Paid time off is based on the percentage of time worked. Both full-time and part-time associates participate in the cash profit-sharing plan.

Job sharing exists, including at high levels. The IS department, for example, is led by a full-time Senior VP Co-Director

and a part-time VP Co-Director. Both are female.

The company has a formal flexible work option. Reduced schedules and other flexible options are available to anyone who can make a business case that this can work for the individual and for the company. The formal policy explains the appeal process. A representative from HR works with the associate to work out a mutually beneficial agreement.

Kelli Brownell doesn't think a lot of management time is required to make this work. "Some managers have to get used to being more flexible," she says. "Goal-setting takes place so the manager and associate can jointly agree on goals in the first place." Since the benefits are mostly automated, pro-rating them doesn't take additional time.

Management's View of the Benefits

Brownell credits these flexible options as one of the factors that contribute to the company's turnover rate being lower than the overall industry. "People here really can achieve a work-life balance and change as their life evolves," she says. "People go from full-time to part-time and back. As long as the job can work that way, it works for everyone. There's a lot more loyalty, too, because people can make those kind of arrangements."

"Historically the financial services industry turned to part-time to save money on benefits," Brownell notes. "For us, two part-timers are more expensive on the health plan. That's not why we do it." Rather, she says, the options are tied to the company's overall vision and mission. "We really believe in people. This is just a piece of the whole culture of Johnson Financial Group." Also, she points to the positive feedback from associates that this flexibility is really meaningful. "They appreciate the company working with them on this."

Advice for Other Employers

Brownell says it's worth giving people the opportunity to try reduced hours options and then reviewing the situation. "It's not necessary to commit to it for life," she says. "We always say we'll evaluate this with you and your manager to see if it's viable. You can structure it so you fine tune it along the way to make sure it's working best for everyone." Brownell

encourages other companies to be open to exploring flexible work options with associates. "JFG's experience has been very positive when managers and associates work collaboratively," she says.

Employee Perspective

Dave Adam is Vice President of Corporate Finance and has been with Johnson Financial for about six years. He works 80 percent time, a little less in summer, more in winter. Before that, he was a senior officer managing the IS department of a bank which was acquired by another company. Adam was offered a full-time job, but wanted to spend more time with his children, then ages 1 and 3. He was able to make the connection with Johnson Financial and started at three days a week. His wife also works less than full time as Comptroller in a manufacturing company (see entry for Northwest Coatings).

I had a pretty high position at another firm which imploded when the company was bought out. It puts things in perspective when you see what you worked for come tumbling down. You realize there's a very short window of opportunity with kids when they still want mom and dad around. It was a perfect time for me to hop off that particular wagon.

It's not easy to turn off the engine. Like many males, I tended to measure success in terms of accomplishment. The more one works, the more one accomplishes. It took some time for me to recognize that success comes in many flavors, like the pride in having a relationship with your son such that he asks you to be the coach of his basketball team. I might not if I were working 50+ hours a week, which a lot of people in the full-time world are.

For me this schedule works well. I work very hard when I'm at work. I appreciate the flexibility and manage my time. Time off allows me to coach and to serve in a leadership role in several charitable boards. Johnson believes in family and community—it's one of their core values. A part-time schedule gives me more opportunity to live that value.

As far as accomplishments, my boss would say I accomplish as much or more as some full-time employees. You come in more refreshed to tackle what's in your in box. The benefit to the employer is a dedicated employee who can focus on

the effort at work.

There are downsides. My time at home is time at home. So supervisors and team members

need to be accommodating. They're a great group of people on both parts of the ladder. I have to make sure they get stuff to me in advance if I'm gone on a given day and work meetings into the time I'm going to be there. Johnson as a company does a very good job of accepting that. Over a third of employees in my department are part-time, most of them female. There's only one day where everyone is in, so we have team meetings on that day.

Our department does surveys rating many things, including work-life balance. They ask, 'Do you feel the stress level at work is increasing or decreasing? Do you have time to live out the vision of Johnson?' My supervisors on occasion will say, 'I had a chance to do x, I think about the Dave Adam approach, and I ended up taking my daughter on a ski trip instead.' They're trying to strive for a more positive, family-friendly balance.

I believe strongly in giving back to the community. I went to school in England and spent six months overseas in many countries. The American view of work is not shared by many others. A global perspective helps.

Kahler Slater

Location: Milwaukee

Type of company: Multi-Disciplinary Design Enterprise

Contact: John Horky, HR Guy/Principal

Total number of employees: 112

Part-time employees: 11, 3 non-exempt and 8 non-exempt

Options Available

One-third of the staff of this firm, which began in 1908, has some ownership role, and roughly half the workforce (and a third of the senior leadership) is female. Rather than one CEO, the firm has three EOs. "We didn't go out of our way to design a special sensitivity to attract women," says John Horky. "We just

'Some managers have to get used to being more flexible.'

asked ourselves, how do we want to treat people?" Offering reduced hours is one answer. The firm set up a detailed breakdown of hours options and has people working from 22 to 40 hours a week (with 45 considered full-time for salaried employees). Anyone working 20 hours or more receives pro-rated benefits, reaching full benefits at 30 hours. Non-exempt employees must work 30 hours to receive holiday pay. No one has yet presented a proposal for job sharing.

Kahler Slater formalized the part-time options six years ago, but some had been working that way informally since 1992. "Then we realized we need to treat people equitably," Horky explains.

Of those who work part-time, three are associates (a non-equity leadership position) and two associate principals (with stock ownership). Part-time staff also include a marketing manager, an accounting manager, the PR manager, and a co-team leader of the firm's higher education team. While most of the women reduce hours because of family care responsibilities, four do so for other reasons. A male licensed architect goes part-time on a seasonal basis in order to teach.

The firm doesn't use a policy or pattern to determine work assignments. "Just as water finds its own level, when someone becomes part-time, we're judicious about their project assignments," Horky says. "We don't want to over-commit them. We want to make it successful for them to achieve balance." He notes that the associate principals who work reduced hours were both promoted while in those schedules.

Management's View of the Benefits

"It does take a lot more effort to manage expectations in this fashion," Horky says. But he points to the benefits: "the long-term working relationships, the commitment of the firm to staff and staff to the firm." Horky cites the fact that turnover at Kahler Slater has run less than half of the industry average for the last four to five years. Given the costs of replacement, which Horky puts at anywhere from \$10,000 to three times the person's salary, that's a major savings. "It's absolutely been worth the investment," Horky says. "These people are loved by their clients.

Ninety to ninety-five percent of our work is repeat client work. Having this quality of staff makes a significant contribution to our bottom line."

Advice for Other Employers

Kahler Slater had five people from different parts of the firm spend a lot of time thinking through what would be fair at the different levels. "A lot of these sensibilities were driven not by me from HR experience," Horky says, "but the things we're doing within our culture, to make sure we're treating everyone the same. It's been robust because we had administrative people in the room saying, this is good in theory, but not in practice. We've tweaked it along the way." Get those voices involved, he urges.

Horky also points to the firm's willingness to re-open discussion when necessary as things change. The important thing is to define core beliefs and values, something Kahler Slater spent a year and a half – and a lot of billable hours – doing. "It was very participative – at times the entire firm was influencing the outcome," says Horky. "Having established that, whenever someone proposed something in the context of this vision, it's appropriate to consider it."

'We're judicious about [part-timers'] project assignments. We want to make it successful for them to achieve balance.'

Employee Perspective

Katherine Schnuck is an architect and associate principal who works 37-38 hours a week at Kahler Slater. She had worked at a hospital for six years and brought expertise in health care.

They knew that I could do the job. I was asked, what do we need to do for you so that you'll work here rather than at a rival firm.

I had worked full time at corporate jobs for 17 years, sometimes 60-70 hours a week. I learned early that this wasn't for me. I wound up physically ill. So I looked for a position that didn't require so many hours. When my son was born, I wanted to have flexibility so he didn't have to be in long hours of care before and after school. As he got older, he needed someone to be available to go to a track meet or watch a basketball game. My husband travels once or twice a month. For both of us to be on that kind of schedule would have been too difficult. Children benefit by having working parents, but I didn't want him always to be in someone else's care.

A big piece of the negotiation was that I would work across all the health groups. I'm available to answer questions or work with other teams. I do all the research, act as a mentor for younger team members and a resource for entire teams. So I don't have to be there when there's an absolute deadline and you might need a long day to crunch the project out.

When I was corporate, I hired several people part-time, both men and women. It helped if they were willing to share enough background to make me comfortable that they were really reliable.

I don't think my schedule has hurt me at all in terms of advancement. This is a very peer-oriented organization. If peers appreciate what you're doing and speak well of you, you'll be promoted. But this firm also asks people if they want to move up. Some say no – and it hasn't hurt them in any way. If you have a lot of expertise and are working hard and contributing to the enterprise, you'll be rewarded.

KPMG

Location: Milwaukee

Type of company: Professional Services Firm

Contact: Barbara Wankoff

Total Number of Employees: 66 in Milwaukee (18,000 nationwide)

Part-Time Employees: 16% nationwide

Options Available

KPMG offers six different options for flexibility, defined as giving more control to the individual on where, when and how to work. Among these are three reduced hours options – part-time, job share, and phased return from leave.

Those who work more than 1000 hours in a year are eligible for all benefits, including medical and dental, all services, access to the Employee Assistance Program, and resource and referral. Paid time off is pro-rated.

The company has a flexible work arrangement toolkit, which is available internally online. Employees who are looking for any kind of flexible work arrangement would complete this form. "It asks you to look at the responsibilities in your job, what arrangement you're looking for, how you propose meeting the responsibilities in the job, what change you want in your work arrangement," says Barbara Wankoff. The form is then sent electronically to your performance manager and to the HR manager, where it will be approved, revised or declined if the business can't support it. "HR is involved in that decision," Wankoff notes, "so that we're sure every individual is given fair consideration and evaluation." All the options are explained online and are easy to process. Wankoff says formal requests and proposals are usually approved because there has almost always been some discussion beforehand. They're now trying to track how many are declined, and also trying to look at informal conversations where someone might be discouraged from asking.

Someone returning from leave has the option, subject to performance manager approval, to return on a part-time basis for a period of time, including telecommuting some days. "We find this very beneficial," Wankoff says. "It helps the individual return to the workplace after leave, eases the transition, helps someone manage both their work and personal lives."

While KPMG has had many of the options for some time, the firm did a climate survey in 1999 and identified several key challenges, one of them being work-life effectiveness. That was when they put the toolkit in place and began promoting flex options, as well as tracking its use. "We made a firm commitment to enhancing flexibility in the workplace," Wankoff says. Last year they estimate that 16 percent of employees firm wide were on some kind of flexible work arrangement, 10 percent of those were male employees. Forty-one percent on documented flexible work arrangements are at manager level or above.

Two other features shore up the reduced workload options. Performance managers receive special training on the options both online and in the classroom. In addition, KPMG introduced a reduced workload compensation model. They reviewed what billable time means for these employees since most work with external clients, in order to have a fair way to evaluate and measure their performance against their peers. "The model asks people to look at what was on their plate and what's coming off," Wankoff says. "We use the equation to come up with a new chargeable hour and utilization goal." This more fairly reflects their performance and allows for the same promotional opportunities or recognition. It also makes sure part-time staff meet their client responsibilities and that teammates don't have an unfair burden. This helps the performance manager, too, making them more willing to entertain reduced work schedules.

Management's View of the Benefits

"We think there's a tremendous benefit in retention, morale, efficiency and productivity of our employees," Wankoff says. "There's no doubt it's a win-win for everyone. Survey data indicates over half of those on a flexible work arrangement would have looked for work elsewhere if not given a flexible work arrangement."

"You really have to look at the business case in terms of the costs of turnover," she says. "We looked at exit data, the cost of turnover, did some surveys so we understood it from the employee's perspective. While there are challenges in managing it, our managers are understanding that there's a huge cost to

not managing it. That's really important to keep at the forefront of everybody's mind."

Advice for Other Employers

Wankoff says you can offer all kinds of programs and policies, "but it's the message that leadership sends with those policies that really dictates how they're used." KPMG's approach is to put out a lot of communication from the chairman or vice-chair, followed by a more personal message from the office managing partner, urging employees to take personal time and be with their family, have genuinely work-free vacations. The more attention the issue gets, the easier it is for people to recognize that it's important.

"It's just as critical to be sure there's not another message coming out the day before or after saying, make sure your chargeable hours are up," she adds.

Employee Perspective

Lisa Mautz, a Senior Associate in Audit, has been at KPMG for four years, working 24 hours for two of those after the birth of her first child.

I knew I wanted to arrange something to continue my career and have time at home with my daughter. So I discussed with KPMG what the best situation might be. It's not the easiest thing to be part-time in public accounting. We arranged my schedule so I work on just a couple large clients that I was familiar with. The firm allowed me to set the percentage, and it was my responsibility to get to the level I need to be at to reach that percent. They're really flexible – if I feel I'm doing too much, I have the choice to change my percentage or scale down the expectation. That's open to discussion as years go by.

I've had more advancement than I expected. I let them know what they can expect from me and I meet those goals, and that's been very appreciated.

If I couldn't have had this schedule, I would not have stayed. I made the commitment to my family that I would not work full-time. [Reduced hours] is starting to become a little more common in public accounting but I'm certainly one of the few here and at other firms.

To other employers I say, you'll lose a lot of really valuable people if you don't consider doing this. Sixty percent of a good employee's time is better than zero. Turnover is hard enough to make up for

without adding to it by not being flexible or having an arrangement like this.

To other employees I say, be very specific in what you want. You need to be very firm on not doing more than you want. Hopefully your employer will do as much to work with you as they can, but a lot of responsibility is on the employee's shoulders to communicate and make it work. Give feedback when there are problems. That comes with time – don't give up after a couple months. I learned what works and what doesn't, and I communicate that to my supervisor whenever it comes up so it's documented.

State of Wisconsin

Location: statewide

Contact: Karen Timberlake, Head of Employee Relations

Total number of employees: 40,541 permanent, classified, executive branch employees (includes classified employees at UW system)

Part-time employees: 3,697

Part-time Managers : 115, 65 male, 50 female

Options Available

Since 1977, classified staff can do their job part-time and receive the same benefits as full-time employees if they work at least 20 hours a week, with paid time off pro-rated by the percent of FTE. Retirement contributions are based on salary. Those who work less than 20 hours pay for half the cost of their health care premium, with the State paying the other half. Job sharing is also an option.

As a public employer, the state of Wisconsin formalized these options both in statute and in union contracts. The typical contract language states that the state "recognizes the value of alternative work patterns" and also that it "strongly encourages and works to implement them." Departments are asked to report affirmatively what they are doing to foster alternative work schedules. While recognizing that a "greater number of permanent part-time employment opportunities are necessary to allow citizens a higher level of participation in the workforce," the statute also stipulates that no employee occupying full-time may be involuntarily demoted, transferred, or reassigned as a result.

Reduced hours options are managed agency by agency under the broad guidance of this very clear statutory direction. According to Karen Timberlake, these options have "become part of the culture." While there could be a case where an employee's job might seem too complex and technical to allow for reducing hours or job sharing, Timberlake says she's never heard of such an example.

"There's a high degree of understanding that this is what we do," says Timberlake. She herself now has a part-time manager in her department and she served as a manager part time at the Department of Justice. "Employers need to be open to the possibility that this can work," she points out. "There are many ways of setting up the work flow and reporting requirements even for managers so they don't have to be there five days a week."

Because the State is such a large employer, says Timberlake, "it's often possible to set up work assignments and work flow to accommodate part-time schedules. This could certainly be more challenging for small employers."

Management's View of the Benefits

In Timberlake's opinion, the benefits are "tremendous. There's no question in my mind that it works both as a recruitment and a retention tool. We get very good employees coming to the State who for whatever reason don't want to or aren't able to work five days a week. Because we can set up these alternative arrangements, there's a whole class who apply and stay with us we wouldn't otherwise get. From my personal experience and those I've worked with, I firmly believe part-time staff are in many cases more satisfied with their work and more productive. They view a part-time schedule as such a benefit that they're very motivated to make it work."

The major challenge theoretically is an issue of equity, says Timberlake. You want the option to be as possible for custodial staff as for an attorney. "It's an issue of people whose jobs have to be done in the office, in a particular physical space versus those who can read email at home at night. We have to make sure we're able to deliver it in an equitable way."

From the employee's perspective, she points out the importance of making sure this stays a part-time job. A social worker, for example, might be paid for 20 hours and routinely work 30 and 35. "It's important not to take advantage of people who've reduced their income by expecting them to do the equivalent of when they worked full time," Timberlake says.

She hasn't heard of any complaints in the way part-time employment policies are being implemented at the State, and since 85 percent of the classified workforce is represented, she assumes she would hear from the state employees' unions if there were a problem. "There may be room for more central oversight in the spirit of good government," she says.

Advice for Other Employers

"This really does work," Timberlake says. "It's a great recruitment and retention tool, a way to set up the workforce to meet the needs of employees and their families. Employees who are happy with their schedules, be they full-time or part-time, stay with us longer and do better work. That's a good thing for everyone involved, including their families."

"If employers are not trying it," she adds, "I encourage them to try it. Involve employees to problem solve if the employer is worried that work won't get done. Let employees be part of the solution."

'Involve employees to problem solve if the employer is worried that work won't get done. Let employees be part of the solution.'

Agnesian Health Care

Location: Fond du Lac

Contact Person: Kathy Duchac, HR

Total Number of Employees: 2,400 systemwide, which includes Waupan Memorial Hospital plus a campus in Fond du Lac that includes St. Agnes Hospital, Fond du Lac Regional Clinic, Consultants Laboratory and a long-term care facility, St. Francis Hall. Total on that campus is 2100 - 2200.

Part-time employees: N/A

Options Available

As a health care facility, Agnesian has many part-time positions based on business as well as employee needs. They hire employees as .5, .6, .7, or .8 FTE (full-time equivalent). Anyone half-time (.5) or above is eligible for health, dental and other insurance. Part-time employees receive the same benefits and pay the same premium as full-timers. Paid time off (PTO) is based on work hours – the more hours you work, the more time you accrue.

Job sharing does exist but is not utilized a lot. Generally it happens when two people are willing to share one position. "I've seen it work beautifully in a clinic setting at Consultants Laboratory," says Kathy Duchac. "We don't always know [which of the medical lab technicians] is there - they work it out themselves." She points out that the arrangement allows for continuous coverage. If one is on vacation or has child care problems, the other fills in.

In addition to reduced hours, Agnesian has a weekend program that pays additional compensation to employees who agree to work 48 out of 52 weekends. This has been popular with some mothers, who can then be off all week with their children.

Some retired staff go to "occasional" status, in which they are not assigned an FTE, but are compensated based on how many hours they work. This might be ideal for someone who wants to be gone in winter, back in summer. Because they're not assigned an FTE, they do not receive benefits, but do get a higher rate of compensation. Hours are scheduled on an as-needed basis, taking into consideration the employee's time needs as well.

Since St. Agnes is a health care facility, "part-time hours have pretty much been there forever," Duchac says.

An employee interested in working reduced hours can request this via the department director. That person generally brings in an HR consultant for the area as well. If the business can accommodate it, they will. If it isn't possible to change an existing job, the employee always has the possibility of transferring to another opening that is part-time. Openings are updated on a daily basis.

If the change of status goes through, the person remains benefit-eligible if he or she is .5 FTE or more. Since paid time off and sick time are based on worked hours, tracking this is not difficult.

Management's View of the Benefits

Providing benefits does have a cost, Duchac points out, and the budget may not always allow it. At the same time, it allows for greater flexibility. "People may perhaps pick up an extra day when you're in a bind," says Duchac. "That's a plus for the organization. And you have people to do the work – it's better to have part-time staff than people at home." Being in health care, she points out, means there are always weekend patients. "Anything to get people to work weekends helps those who've been there for a long time."

Advice for Other Employers

"You have to see how it will work in your department," says Duchac. "With the workforce shortages predicted down the road, especially in health care, you have to be creative to get adequate staffing."

'[Our] pension plan no longer penalizes the individual who wants to reduce hours before retirement.'

Columbia St. Mary's Hospital

Location: Milwaukee

Contact: Caroline Buser, Director of Benefits

Total number of employees: 5700 employees

Part-time employees: N/A

Options Available

Columbia St. Mary's consists of four hospitals, 5700 employees and more than 1,200 physicians with one stated single purpose - to provide superb patient care. The system serves individuals and families in Milwaukee, Ozaukee and Washington counties, with more than 155 years of service.

"Health care by definition is job sharing," says Caroline Buser. At Columbia St. Mary's (CSM), part-time employees who work 20-35 hours are eligible for benefits. Those who work 36 hours or more are considered full-time. Medical and dental plans are the same for both groups. Part-timers pay more toward monthly premiums than full-time employees do, a common practice in most health care facilities.

Paid time off (PTO) accrues according to total hours worked. Anyone who works a holiday receives double time, regardless of the total number of hours worked. Written policies and benefit brochures explain in detail how reduced hours options affect benefits.

Pension for employees consists of a defined benefit plan and a defined contribution with a match. As of 2004, thanks to CSM's relationship with the Ascension Health national health care system, the pension plan no longer penalizes individual who wants to reduce hours before retirement, as long as they work more than 500 hours a year. "This encourages individuals who want to ease down those final years of working," Buser says.

Job sharing is done on an informal basis. Decisions are based on the department director and the needs of the department on a case-by-case basis. Columbia St. Mary's also has about 1000 "pool" employees, who fill in as needed and are not eligible for benefits eligibility.

Management's View of the Benefits

"You have to have flexibility," says Buser, "especially when you're a 24/7 workplace. Everyone works and has a life outside. When people are sick or on vacation, we can call on part-time people to flex up. It works for them and fills our vacancy need." She also feels the flexibility is a "definite factor on retention. In health care, paying benefits for part-time is a cost of doing business."

Since support areas such as administrative clerical, food service, and house-keeping also have to be performed on a 7-day basis as well, reduced hours options also work well there.

Madison Teachers

Location: Madison

Contact: John Matthews, Executive Director, Madison Teachers Inc., and June Glennon, Employment Manager, Madison Public Schools

Number of employees in this bargaining unit: 3000 (in addition to teachers, this includes all non-managerial professionals such as social workers, counselors, librarians)

Part-time Employees: 8 are in job shares (another 72 job share one position and work half-time in another), including 2 men. Another 33 teachers work reduced schedules with the right to go back to full-time.

Options Available

Teachers and others in their bargaining unit can work part-time, both reduced schedules and job shares. John Matthews describes the District as "hesitant" when the union first proposed this option nearly 20 years ago, "but once it was running smoothly, it was an advantage both to them and us" by keeping experienced people employed. Matthews estimates the cost of the hiring process at \$35,000 a person. The District agreed to try reduced schedules as a sidebar agreement in 1986, and added it to the contract in 1990. At the time, it was driven by teachers who wanted to slow down but not yet retire. Today those utilizing the arrangement are mainly young parents, along with teachers working on a higher degree.

Under the contract, those who work at least half time qualify for full benefits.

Teachers and others who formally job share split the benefits package of one FTE, agreeing between themselves how to divide it up. Two individuals propose the job share and have to have permission from their school administrator, who then works with them on the hours. The option is available to those who have been with the District for five years.

People at retirement age need first to retire. After a minimum of 30 days, they can express interest in working as substitute teachers or on a part-time basis.

Employment Manager June Glennon says that some principals are concerned that job sharing is not in the best interest of quality. "My attitude is, if you have the right team, it works well and you can get more than 100 percent," she says. "Kids need continuity, consistent expectations and consistent communication to parents. Especially on the elementary level, it's critical that teachers are teaming well." She points out that job sharing is easier at the secondary level, where a teacher might have students once or twice a week – a teacher would have fewer classes, but the students would not be affected.

"Most principals are willing to look at each situation and see how it impacts students and also consider the retention of good teachers," Glennon says. "If it's a young teacher with a new family, for instance, they'll think about long-term loyalty if they can accommodate it."

Glennon recommends to any supervisor involved to sit down with the two parties and agree on fundamental things. One issue is scheduling, and whether the job sharers can fill in for each other in case of absence. Another is dealing with parent-teacher conferences, and a third is methods of communication, including whether they will have any overlap time for face-to-face communication. "Make sure both are aware of what the other is doing, especially in the classroom," Glennon says, especially in elementary school classes, so that students have continuity in the subject and how it's taught. Job sharers should also figure out how they'll cover in-service days or other trainings. "Talk about everything where it may be important for both to be there even if it's not their day to work," she says.

The principal determines how to monitor the effectiveness of the arrange-

ment, and has the right to dissolve the job share at any time if it's not working effectively. If the teacher then wants to continue part-time, he or she will have to seek a transfer to a part-time position. "Usually job shares work very well," Glennon notes. Generally they are people who know each other well, have worked side by side and have already established good communication. Where it hasn't worked, she notes, there has been less clarity. "It's just common sense -- communication is key to everything."

Union and Management's View of the Benefits

The MTI's John Matthews points to the importance of full benefits for reduced hours. "It takes an employee two to three years to get up to speed and really be the employee the employer wants them to be. Keep the person you know can do that rather than starting entirely over. If two people are job sharing, it works even better." Glennon notes that some of the district's best teachers have done this at one point or another in their career. Usually they don't do it long term. "You gain a lot in the year or two that they need to do this by keeping them on board," she says.



Advice for Other Employers

Matthews says this policy has helped the school district with recruiting and retention. "It's a big benefit for the employer in helping to keep the employment base," says Matthews. "Maybe it's a little headache now and then, but it's more than worth it."

"It's just part of good business to keep staff happy and accommodate them if you're able to without compromising service," says Glennon. Consider carefully whether or not the job share will work and communicate well as the process goes along. She notes that there are some hidden costs at having more than one person do the job, but it's still worth it to evaluate each situation.

Employee Perspective

Dave Fawcett has been a teacher for 10 years. When his son was born almost a year ago, Fawcett took a three-week leave, then went to a 50 percent schedule for the rest of that year. He was teaching two separate assignments, which made it simple to make the switch.

I feel like it was an important time for me to be with my new child. It's a window to bond with him that will never quite be open in the same way again. I was able to see him 24 hours a day for the first few weeks, then be a significant caregiver for the next seven months. I had a similar experience with my first child. We developed a strong bond then. Now she's four and we're really close. I feel it's because I was one of the faces she saw the most when she was developing her understanding of what's important and who's important in her world.

My partner was able to take maternity leave and additional sick time, and then she also worked part-time. One of the two of us was the caregiver for our children for their first nine months. That meant we did not have to put the kids in day care until they were each nine months old. I value the option of day care, but I also feel bonding with parents is really important for those early months.

M&I Madison

Location: Madison

Type of company: Bank

Contact: Susan Peterson, Assistant Vice President

Total Number of Employees: 4,080

Part-time employees: 989

Options Available

M&I provides many flexible job opportunities for employees, including job sharing, working reduced hours, or working a regular part-time position. While many of the part-time positions are entry-level, the bank also has several high-level employees who work a reduced schedule, including a commercial loan officer who, for family reasons, has worked shorter hours for many years and varies her or his schedule according to client needs.

M&I provides many pro-rated benefits for their part-time employees, including subsidized health insurance premiums for part-time employees who work 20 or more hours a week. Fifty percent of the

premium cost is paid during the first five years of employment, 60 percent with 6-10 years of service, and 70 percent - the same as full time employees - at 11 or more years of service.

"A lot of employers don't provide any benefits to part-time employees," says Susan Peterson, Assistant Vice President, Human Resources Manager. "It's a huge advantage to our part-time employees that M&I provides many pro-rated benefits for them."

Peterson estimates that 75 to 80 percent of part-time employees are college students. "Providing these job opportunities works out very well for M&I and for our employees." If the bank isn't able to grant part-time work in a particular situation, "we work to do it down the road or to transfer the employee to a location where there is a part-time position available," Peterson says. "We try to find creative solutions." Part-time options at M&I also include a "phased-in" return from a medical leave and an option to continue working a "phased-out" retirement schedule. "When an employee is ready to retire," says Peterson, "we might talk with them about shortening their hours instead of leaving altogether - perhaps reducing their schedule to a four-day week, or a three-day week, etc. Every department is different, but we have a lot of long-service employees at M&I, and offering a reduced schedule to potential retirees can often benefit both the employee and M&I."

M&I's flexible schedule policy is posted on their company HR website and explains flexible starting and quitting times, compressed work weeks, and job sharing. Employees are encouraged to talk with their supervisor if they are interested in a flexible schedule option and think it would work in their specific job. If a request is denied, the employee can contact HR. "Typically, the manager will say, 'let's try it and see how it works,'" says Peterson. "I've never had an employee call to say 'I want this, but my manager won't let me.' Employees have an appeal process if that happens."

"We like to have a happy workforce and also feel it sends a good message

'The cost is far outweighed by our ability to retain the talents of many great individuals.'

that M&I is willing to help employees in times they may need additional flexibility, for example during child-rearing years. It usually ends up as a 'win/win' situation."

Management's View of the Benefits

Every employer has seen the cost of health care

going up, Peterson notes, "But providing pro-rated benefits to our part-time employees is a wonderful recruitment and retention tool. Many employees go through a stage of life when they want or need to work part-time. M&I doesn't want to see that talent walk out the door. Is it more costly to offer benefits? Absolutely. But the cost is far outweighed by our ability to retain the talents of many great individuals."

Advice for Other Employers

Peterson says the biggest lesson she's learned is how important it is to create team ownership so the team, not the manager, takes responsibility for scheduling decisions. For instance, if an employee in a small department asks for Thursday and Friday off, the manager may not be able to give others in the department those days off as well. "Get the employees together and say 'Here's the request, how can we do this?'"

Northwest Coating

Location: Oak Creek

Type of company: Manufactures coatings and adhesives for printing and packaging industry

Contact: Kathy Adam, Controller

Total number of employees: 55

Part-time employees: 2

Options Available

This small manufacturer first allowed a customer service rep to reduce her hours for family care reasons. Controller Kathy Adam was hired on a part-time basis. Both work below the 30-hour threshold for health and dental insurance, but they do get pro-rated paid time off, 401 (k) match and profit-sharing. Adam points out the problem for many small businesses: the insurer prohibits covering anyone who works less than 30 hours a week.

Management's View of the Benefits

The company sees this flexibility as a nice benefit, especially in Adam's case. "They get all the intelligence at half the price," Adam jokes, referring to the many years of experience and skill she brought to the job. The firm didn't need a full-time controller, and Kathy Adam, who shares child care with her husband (see Dave Adam, Johnson Financial), was able to meet their needs. During the school year, when the kids are in school, she can work additional hours if the need arises.

Advice for Other Employers

This is Adam's third part-time job. She urges those who want to work reduced hours to "always be the best employee you can be, be reliable, do your job well, be honest, so when you want to make a move like that, your employer has built up a reservoir of faith in you. Once you've made it there, don't take advantage of it in a negative way. Be flexible to make sure what you've agreed to do gets done."

What makes it work, says Adam, if you're in a middle management role, is having good employees under you. "Understand what they're capable of doing when you're not around. You need to learn how to say no, prioritize, really get a good understanding of what people want done. There's always a different level of work you can do, bare minimum, middle, knock yourself silly. Sometimes bare minimum is all that needs to happen. You don't need hours and hours to get what's needed."

Adam urges employers to "spend some time brainstorming before you say no. There might be people willing to step up in different roles who've never done that before. There might be a way to make it work." She points out that the organization will also gain a better cross-trained staff, something particularly important in small organizations.

"There's always something to learn," she notes. "Because it hasn't been done before, things will come up where you say, how will we handle that? But I've experienced more good-natured jealousy than real resistance—others who say, I wish I could do something like that."

Employee Perspective

Kathy Adam considers herself very lucky that she and her husband both have this work arrangement.

The biggest benefit is I get to spend very valuable time with my kids. They don't have to be awakened at the brink of dawn to go to a before-school program or stay until 6:00 at night. I think it's pretty neat that my husband gets to do this, too. There are so many situations where one person works and one stays at home. We're splitting the main breadwinner role between the two of us. He's fortunate to work for as family-friendly a group as Johnson that provides insurance to part-timers – that's very rare. I think generally the kids like this; they don't know it any other way. My husband and I have been working part-time since my youngest was about a year.

What helps this work is that I have a great staff. They're very independent and proactive, and they work really well together, I don't need to babysit them. They know what they need to do, and they know if they need to call me, they can – although they rarely do.

This company has been great when unexpected things come up, like a sick kid. They know I'm going to get done what I need to get done. If I take off another day, I will come in on a day I'm usually off. Not that they expect me to do that, but they know I will handle whatever needs to get handled.

Park Towne Management

Location: Madison

Type of company: Real estate company

Contact: Mary Feldt, President/CEO

Total number of employees: 18

Part-time employees: 5 (3 at 25 hours, 2 of those job sharing; 2 work summer part-time)

Options Available

Employees who work at least 25 hours or more at Park Towne receive full benefits, with time off pro-rated. This includes an unusually high employer pension contribution. Those who work fewer hours receive pro-rated holiday pay as well.

The front desk is staffed by two job sharers. When one went on maternity leave the company brought in a temporary part-time employee. A similar

'It costs almost a year's salary to lose someone and hire and retrain a replacement.'

arrangement existed 34 years ago when Mary Feldt was first hired and the firm had only four employees and its two owners. "This company has always been very progressive," Feldt says. "If the two of you could figure out how to get the job done sharing the job, that was fine."

Flexibility is an important component of what Feldt describes as a philosophy that places primacy on family. These policies are in place "not because there was a labor shortage or it was the in-thing, or revolutionary. It's always been based on caring about the people who work for you and caring about your family. Therefore the employee needs to care for their family and we're going to help you do that." Even though Park Towne is still a small company, "we probably have one of the best employee manuals you can imagine," says Feldt. "Everything is very clear. Part-time policies are laid out." Currently all real estate staff are on salary rather than commission. Feldt thinks if a real estate person wanted to work part-time, they would probably have to move to a commission basis. She'd like to consider an arrangement like this when she's ready to retire. "I don't want to just walk out," she says.

Management's View of the Benefits

Treating employees this way costs money, says Feldt, "but we see the pay back in the long run all the time. One employee told me, 'My husband says no one should enjoy working as much as you do. If I were still working my other job, I'd be considering retiring. I don't think about it now.'"

Feldt refers to the fact that it costs almost a year's salary to lose someone and hire and retrain a replacement. Also, she feels those who are given consideration give it back. "We really feel when the people are here, they work harder to make sure they get their work done. That isn't the reason we do it, but I think they take it on themselves – they say, 'I'm only here 4 hours, I can't waste any of that time.'"

Advice for Other Employers

Feldt describes herself as being “more hard-nosed” when she first started managing. Then she listened to employees who were concerned about inflexibility: “I had to step back and say, Wow, this isn’t right.” She recommends having rules that ensure coverage at all times and flexibility around those guidelines. Feldt also recommends cross-training. “We’re so cross-trained here, anybody can do almost anything, except in accounting,” she says. “The men have no problem answering the phone or making coffee if they’re the first ones in.”

“Try it,” Feldt urges. “Even if you have to hire someone on a temporary basis, get that straight upfront. If someone wants to prove it can work, then do it.”

Employee Perspective

Jean Sloan started with Park Towne two years ago as a receptionist. They were advertising for someone to work weekday afternoons. She took five years off after she and her husband sold a business they had run, and then went back to work part-time.

There’s more to life than 9 to 5. This schedule fits with my lifestyle. I do what I used to do, but in half the time. I have a normal life.

In my job share, we use email to share information. Other people in the office also tell me if something happens that I need to know about. If it’s really important, someone gets the information to me.

Kay [who job shares with me] had been with company for seven years, then left when she had children, then came back part-time. She knows a lot about the company. Between the two of us, we manage to relay information quite efficiently.

You have to have people who are willing to be flexible, it starts there. This way you get older workers who bring experience, or young people who would bring a lot to the business.

I used to own a business and I was wary of job sharing. But now I would consider it, if you have the right people and right atmosphere.

Stowell Associates and Select Staff Training

Location: Milwaukee

Type of company: For-profit social service agency offering professional geriatric care management and caregiving services

Contact: Phyllis Brostoff, President

Total number of employees: close to 200

Number of part-time employees: 60 percent

Options Available

The majority of staff at this care facility prefer part-time work, averaging 23-35 hours per week. Those who work 30 hours or more receive health and dental benefits. Stowell tries to accommodate employees’ preferences – for example, if someone wants weekends only or nights only, or half days, “we try to match their availability and skills to our clients,” says Phyllis Brostoff. All receive pro-rated paid time off, with the option of receiving that as extra pay at the end of the year.

The reduced hours options has evolved over time. When Stowell first started, Brostoff says, it was just two partners. As they added staff and capacity in the mid 1990s, they started adding benefits. “Caregivers were always allowed to work part time,” Brostoff says. “Since clients want people only a certain number of hours, if we could match the time with staff preferences, everyone is happy.” Part-time staff includes a couple of men who are retired professionals who supplement their pensions with part-time work. “They’re wonderful caregivers,” Brostoff notes.

As part of their work to obtain national accreditation, Stowell has been developing clear standards providing for a consistent approach to clients and employees. The company now has an HR manager, along with a quality assurance nurse who does yearly reviews of caregivers’ work and training. Their system includes awards for those who are willing to fill in quickly for someone who has a sick child or some other emergency.

Management’s View of the Benefits

“This is all about retention,” says Brostoff. Stowell’s average number of years of service is three and their turnover rate is 30 percent, which is very low for the industry. Those who leave do so primarily because of family issues or health problems that require some time off work. “It’s very costly to find people and train them and have them understand how you do business,” she says. “This is a complex service to run. We have high standards, report to professionals, follow protocols to assure quality.” The Select Staff Training Institute trains people who aren’t yet Certified Nurse Aides. “What the client wants is one person to stay with them,” Brostoff says. “Our clients are very vulnerable, elderly people who need caregivers they can rely on. Providing training helps to assure they get that.”

Advice for Other Employers

Brostoff acknowledges that it does take time and effort to manage reduced hours. “The organization has to be willing to develop other job descriptions so that this can be done. People have to be willing to share the wealth. If you want to do a good job, you can’t take every penny out of your business – you have to be willing to put it into treating employees right.”

Stowell believes they can defend the quality of staff such an investment produces. “This is women’s work,” Brostoff says. “People think that social workers shouldn’t be paid. Families want their parents treated right, but

some think they should be able to pay a poor immigrant under the table, with no benefits and no time off. That’s not what we’re into. Workers comp, Social Security, benefits, drives up the cost of care – but we believe in it. We also believe these benefits translate directly into quality care.”

Employee Perspective

Diane Patterson works 32 hours a week as a home health aide at Stowell, going into people’s homes to provide care.

I picked that schedule because my daughter was in private school from 8:30 to 3:20. I’m her only means of transportation. In addition to being able to take my daughter to school and pick her up, I needed benefits – you never know

‘We believe these benefits translate directly into quality care.’

when something is going to happen. Had Stowell not offered benefits, I probably wouldn't have turned down the job because I needed work. I just would have prayed not to get sick. Having benefits is much better.

Thrivent Financial for Lutherans

Location: Appleton

Type of company: fraternal benefit society

Contact Person: Deb Palmer

Total number of employees: 2,694

Part-time: total 219 part-time non-exempt, 96 exempt – regular part-time, benefit-eligible

Thrivent Financial for Lutherans grew out of a 2001 merger of Appleton-based Aid Association for Lutherans and the Lutheran Brotherhood out of Minneapolis.

Options Available

The organization considers anything below 40 hours as part-time and offers a range of pro-rated benefits depending on the number of hours worked. Job sharing is also available. While there is no formalized corporate policy about a phased-in return from leave, departments can make arrangements to do so based on their business situation.

Reduced schedules are arranged on a case-by-case basis depending on a manager's authorization of vacancies. All policies are described online, with a description of various employee classifications and a list of corresponding benefits. Employees who want to reduce hours would go to their manager. They could also contact HR through the HR Helpline or HR Business Directors assigned to work with the unit.

The HR Business Director provides managers with tips and techniques that can help manage those situations. "We try to treat those individuals no differently than if they were full-time employees," says Deb Palmer. That means carrying out evaluation and goal-setting but adjusting the expectation for the amount of work that will get done in the shorter period of time.

To ensure that expectations are being met, there needs to be good communication between that employee and the manager as well, says Palmer. In job sharing situations, she recommends some crossover face-to-face time.

Management's View of the Benefits

Palmer says Thrivent especially uses reduced schedules in the customer contact center. "This provides much greater flexibility to service our members and their needs, particularly for peak time periods. We have to value the part-timer as much as a full-timer, because of the contributions they're making to our organization." Providing benefits, she believes, "also shows our commitment and our hope that their commitment will be to be with us for a longer period of time." Hiring part-timers in the call center is relatively new, so Palmer does not yet have data to illustrate the effect on turnover. But she points to the company's experience with individuals who have gone from full-time to part-time in other areas. "It helps us retain the talent as well as the knowledge in these positions," says Palmer. Examples are typically individuals who have come back recently from maternity or paternity leave and been able to reduce their schedules to accommodate the new family member. If they had to maintain full-time status, Palmer says, "most likely they would have left."

The company faces a challenge of filling certain time periods, since many who seek part-time jobs are trying to accommodate their family's schedule. Palmer describes quality part-time options as "trying to fill niche hours with niche candidates."

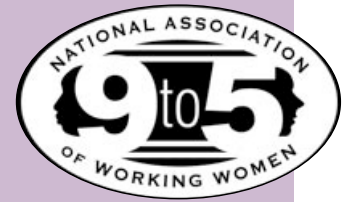
Another challenge is helping people who want to phase out their retirement without reduced hours affecting their pension payouts, since calculations are based on the employee's last five years of service.

Advice for Other Employers

Palmer came from a retail environment prior to coming to Thrivent. "I have worked where they don't provide benefits for part-time individuals," she says. "It

may save some money in the short-term but in the long-term it doesn't provide a good value because of increased turnover and lack of internal knowledge. If you treat people as full-time but just at reduced schedule, they end up being more committed to the organization."

'I have worked where they don't provide benefits for part-time individuals. It may save some money in the short-term but in the long-term it doesn't provide a good value because of increased turnover and lack of internal knowledge. If you treat people as full-time but just at reduced schedule, they end up being more committed to the organization.'



'You really have to look at the business case in terms of the costs of turnover. While there are challenges in managing it, our managers are understanding that there's a huge cost to not managing it.'



9to5, National Association of Working Women was formed in 1973 to improve corporate and public policies affecting working women. The group has long been active on work-family policies through research, publications, first-person testimonies, media interviews and grassroots activity. 9to5 has offices in Milwaukee, Denver and Atlanta and members in every state.

This report was made possible by a generous grant from the Alfred P. Sloan Foundation. The report can be accessed in PDF format by going to the 9to5 website, www.9to5.org. It is also available on the Sloan website, www.sloan.org.

9to5

152 West Wisconsin Avenue, Suite 408

Milwaukee, WI 53203-2508

Phone: 414-274-0925

Fax: 414-272-2870

Email: 9to5@9to5.org