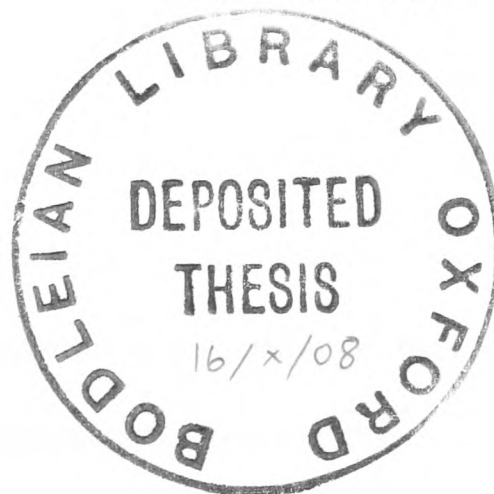


EQUALITY AND DIVERSITY: THE GENDER DIMENSIONS OF WORK-LIFE BALANCE POLICIES

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Abstract

Equality and Diversity: The Gender Dimensions of Work-life Balance Policies

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This thesis analyses the gender dimensions of work-life balance policies in the UK. It focuses on three related questions: firstly, to what extent are work-life balance policies framed by 'diversity'; secondly, how does this impact on the conceptualisation and implementation of work-life balance policies (in government and in organisations); and thirdly, what are the implications for gender equality?

Through analysing published research, the UK Government's work-life balance agenda and data generated from three selected case study organisations, the prominent dimensions of diversity that shape the conceptualisation and implementation of work-life balance policies are presented. This thesis argues that the concept of diversity – as defined by the feminist literature – offers the potential to progress gender equality through overcoming the same-difference dichotomy, and by recognising multiple aspects of identity. However, this theoretical potential is not necessarily reflected in practice. With the emphasis on the individual worker and choice, diversity has been primarily defined as 'managing diversity', and has a significant affect on how work-life balance policies have been applied in both government policy and organisational practice.

The UK Government states that work-life balance policies are meant to provide everyone with opportunities to balance work with other aspects of life. The current policy framework targets parents and in particular mothers, potentially limiting the choices that men and women have to 'work' and 'care'. Locating work-life balance policies within the context of 'managing diversity' supports and facilitates women's employment, but does not necessarily challenge fundamental gender disparities such as occupational segregation and gender pay gaps. Analysis of the UK Government's current agenda and organisational case studies show that despite progressive equality, diversity and work-life balance agendas, work-life balance policies are limited in challenging persistent structural gender inequalities.

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1.0 EQUALITY AND DIVERSITY:

THE GENDER DIMENSIONS OF WORK-LIFE BALANCE POLICIES

1.1 Introduction

This thesis analyses the gender dimensions of work-life balance policies in the UK. It focuses on three related questions: firstly, to what extent are work-life balance policies framed by 'diversity'; secondly, how does this impact on the conceptualisation and implementation of work-life balance policies (in government and in organisations); and thirdly, what are the implications for gender equality? This chapter introduces the central argument, presents the broader context in which this research is framed and outlines the key research questions and structure of the thesis.

Work-life balance policies are gendered, in that they have different implications for women and men. Through analysing published research, the UK Government's work-life balance agenda and data from three selected case studies, the prominent dimensions of diversity that shape the conceptualisation and implementation of work-life balance policies are presented. Whilst diversity has a variety of meanings and interpretations, it is argued here that it has the potential to advance gender equality in theory and in practice. In theory, diversity offers the possibility to overcome the same-difference dichotomy that has challenged progress towards gender equality (e.g. Lister, 2003; Pateman, 1988). This possibility, offered by the feminist discourse of diversity, provides the conceptual framework for this research. In practice, a complex combination of influences that includes an expanded equality remit, and an emphasis on employment and human resource management practices shapes the specific nature of the diversity discourse in the UK. Work-life balance policies are often conceptualised and implemented within this context of diversity. This research explores the gender dimensions of work-life balance policies in the UK from this perspective.

This first chapter outlines the wider context in which this research is set. It firstly outlines working definitions for the key terms ‘work-life balance’ and ‘gender equality’. It then explores the erosion of the male breadwinner / female carer model and the rise of the adult worker model. The potential offered by the UK’s political landscape, with a particular focus on the optimism accompanying a Labour electoral victory in 1997 is also considered. Demographic, employment and workplace changes are then discussed, to present the complexities that work-life balance policies are trying to address. The changing composition of the workforce, as well as changes in work are aspects that are examined. The chapter proceeds to explain the research in more detail by discussing the key research questions and finally provides an outline of the rest of the thesis. By exploring work-life balance policies in the context of diversity – through the literature, government documents and organisational case studies – this research contributes a new perspective to current policy debates and discussions on gender, and in particular on work-life balance policies.

1.2 Working definitions of key terms

1.2.1 *Work-life balance*

The UK Government has defined work-life balance policies as being for everyone to ‘find a rhythm to help them combine working¹ with their other responsibilities or aspirations’ (DTI, 2004c). It includes flexibility about when staff work (e.g. job sharing, flexi-time, annualised hours, flexible retirement and part-time working), where staff work (e.g. home working), and giving staff a break (e.g. maternity, paternity, adoption and parental leaves and career breaks) (DTI, 2004f). Services (e.g. counselling services), amenities (e.g. gym membership), and other benefits (e.g. childcare vouchers) are also often considered to be work-life balance policies. Work-life balance policies are therefore defined as policies that provide opportunities for people to balance multiple roles and responsibilities. This is the working definition adopted. Whilst it is recognised that the

¹ Work in this context means paid work. Throughout this research it is recognised that work also includes unpaid work.

term 'work-life balance' has many shortcomings – such as the assumption that 'work' and 'life' must be 'balanced', which does not necessarily account for the porous boundaries between these spheres (and others), nor allow for changes over the life-cycle – it is the term that is most recognised in the UK. 'Work-life balance' is also the term that has the most purchase with government and employers and therefore is the term used throughout this research. The benefits and shortcomings as well as alternative terms for 'work-life balance' are discussed at length in Chapter 4.

Whilst work-life balance policies are intended to be for everyone, the majority of policies implemented to date have been focused on parents with dependent children. This inherent tension is discussed in further detail in Chapter 4. As a result, this research has a strong focus on parents.

1.2.2 Gender equality

Gender equality is a complex and multi-dimensional phenomenon. Equality has long been an aspiration of the feminist movement, despite much disagreement over its definition and goals (Phillips, 1987). Stated commitments to gender equality do not necessarily convey the specific nature of equality envisaged. A range of feminisms exist, with a variety of goals and definitions of equality (e.g. Marxist, environmentalist). The following outlines a definition of gender equality drawing on the work of social policy academics.

In the US and UK in the nineteenth and early twentieth century, first wave feminism was grounded in a liberal conception of equality, focused on women's enfranchisement and extending political rights. Second wave feminism in the 1960s, however, was fuelled by social changes such as increased education and employment opportunities for women, the introduction of legislation on abortion and equal pay, and availability of birth control (Kemp and Squires, 1997), where distinctions between 'sex' and 'gender' were identified

as crucial. Whereas 'sex' refers to biology, 'gender' refers to socially constructed categories where characteristics such as 'feminine' and 'masculine' are culturally constructed and variable, reflecting gender norms and stereotypes that do not necessarily reflect the 'sex' of an individual (e.g. Browne, 2007; Phillips, 1987; Robeyns, 2007). And whilst 'sex' and 'gender' are not always discrete categories of analysis – particularly as post-modern theories have challenged the binary dualism of 'male' and 'female' – at its core 'gender' can be defined not as a dichotomy of differences between men and women, but rather as relational, where dynamic and interdependent relationships exist between 'women' and 'men' (Daly and Rake, 2003).

The working definition of gender equality for this research builds on this relational aspect of gender, and incorporates an understanding of the relationship between states, markets and families (O'Connor, Orloff et al., 1999). Daly and Rake (2003, p89) define gender equality as being:

'a discourse of rights, one of its advantages being that it recognizes that gender is, in part anyway, composed of and constituted by differentials in power between women and men, and that these are not just expressed in the public sphere but are created there as well'.

The adopted working definition of gender equality is defined as conditions in which women and men have genuine choices (especially, in this context, to participate in work and care). It is about ensuring that access to opportunities is equitable and not determined or constrained by one's sex. Whilst the term 'genuine choices' raises further conceptual complexities, it is clear that choices need to be less constricted to advance towards gender equality (e.g. Lewis and Campbell, 2007). Fraser (1997) develops seven essential principles in defining a vision of gender equality. These principles are: anti-poverty, anti-exploitation, income-equality, leisure-time-equality, equality-of-respect, anti-marginalization, and anti-androcentrism. Each of these principles must be fulfilled to achieve gender equality. Whilst Fraser's definition sets out a vision for gender equality

that may not be attainable in today's society, it offers a way to conceptualise gender equality beyond a constricting dichotomy, and where genuine choices may be exercised.

1.3 Setting the wider policy context

The wider policy context matters to the way that work-life balance policies are conceptualised and implemented. Welfare state policies contribute to the distribution of money, time and opportunities across the life course (Daly and Rake, 2003). The embedded breadwinner / carer logic of the state, the opportunities offered by the political landscape post-1997 and demographic, employment and workplace changes are all discussed. Although there has been much progress made towards gender equality in the UK, gender inequalities in the workforce (and in the home) still exist. There are gender differences in the number of hours people work, vertical and horizontal occupational segregation and pay inequities. This links gender equality and employment and therefore validates an evaluation of the gender dimension of work-life balance policies.

Work-life balance policies are not always considered with gender equality as the central driver (Lewis, 2007). The UK Government outlines a number of simultaneous aims for its work-life balance agenda that include; reducing child poverty rates, enhancing child well-being and increasing female employment rates, as well as pursuing gender equality (Chapter 4). In promoting these goals, parental choice emerges as a central theme. These choices often have explicit gender (as well as class and ethnic) dimensions. Negotiations within households on work and care are set within broader understandings of the labour market, gender stereotypes and child well-being.

1.3.1 Erosion of male breadwinner / female carer models

Traditional breadwinner / carer models² of work and care have lost much of their saliency. The post-war settlement between labour and capital and men and women that created and maintained the male breadwinner / female carer model has been eroded. Traditional assumptions associated with male breadwinning and the family wage have been criticised on a number of grounds including institutionalising gendered inequalities, failing to keep pace with men's and women's changing experiences and expectations, and failing to utilise the labour market potential and skills of many women (Daly and Rake, 2003; Esping-Andersen, Gallie et al., 2002; OECD, 2001). Connected patterns of increasing female labour market participation, changes to employment such as the growth of the service sector, and high availability of part-time jobs, combined with a decrease in men's labour market participation, have challenged concepts of breadwinning and caring (Warren, 2007). Instead, there has been a notable shift towards adult worker approaches, in which women as well as men are increasingly expected to be fully active in paid work (Lewis, 2001; 2002).

The adult worker model assumes an individual who is active in paid employment. This has been evident at both EU and member state levels, where there has been a noticeable shift in both policy direction and rhetoric towards an adult worker model, most evidently through the European Employment Strategy (EES) and Lisbon targets. The focus has been on increasing labour market participation, with specific goals for women (discussed in Chapter 2). When viewed through a gender lens, the adult worker model raises concerns for gender equality, as the relationship between paid and unpaid work is not adequately considered. The adult worker model commodifies time and care work, with the language of productivity dominant (e.g. Perrons, Fagan et al., 2005). Although the adult worker model implies a gender neutral worker, gender disparities in work and in the home mean that it is a gendered concept in application. It is also set within the wider

² The terms 'breadwinning' and 'caring' are used broadly throughout this research. It is recognised that breadwinning and caring are concepts that are contested and debated (e.g. Finch and Groves, 1983; Warren, 2007)

context of the welfare state, where policies have played an essential role in facilitating (or limiting) opportunities to work and care.

Social policies are important in supporting progress towards gender equality (Hobson, 2004; Korpi, 2000). The nature and combination of policies may support gender equality aims. Welfare principles related to maintenance, care, work and citizenship are gendered to varying degrees (Sainsbury, 1999). Research on welfare states from a gender perspective provides a strong evidence base of how policies impact on gender equality: for example, the gendered nature of 'dependency' (women's dependence on men and / or the state); 'defamilisation' as the extent to which individuals can uphold acceptable standards of living independently of family relationships; and 'decommodification' as the degree to which individuals can remove themselves from the labour market and its bearing on their rights as citizens (Lewis, 1992; Lister, 2003; Orloff, 1993). Policy packages need to respond to complex issues such as the distribution of resources, provision and time, what incentives they may offer, and how they are allocated by the state, market and families (Leon Borja, 2002).

Gendered assumptions and aims vary by national contexts, resulting in different outcomes (OECD, 2007). Leaves around the time of a child's birth are indicative of this, and are part of the work-life balance agenda. For example, the length and wage replacement level of parental leave varies from supporting mothers to primarily care for their children, to encouraging mothers to participate in the labour market, to encouraging fathers to take periods of leave (Deven and Moss, 2002). The duration of, and wage associated with any leave provision have implications for gender equality given labour market gender inequalities. The provision of leave policies further constructs and influences notions of 'parenthood', 'motherhood' and 'fatherhood'. For example, the Icelandic model of three months' of non-transferable maternity leave, three months' non-transferable paternity leave, and three months' for parents to decide for themselves has

significantly increased the amount of time that fathers take as leave. In addition to taking the allocated paternity leave, it has also impacted on the way that the shared block of leave has been negotiated and divided, with fathers taking overall a third of parental entitlement (Einarsdottir and Petursdottir, 2006). This is in contrast to Germany, where long maternity leaves have resulted in embedding a notion of motherhood that focuses on caring, arguably contributing to labour market detachment for many women (Gornick and Meyers, 2003).

In the early 1990s, the UK was categorised as a 'liberal' welfare state (Esping-Andersen, 1990). From a gendered perspective, Lewis (1992) has interpreted this to mean that the UK displayed a 'strong' male breadwinning policy logic, subscribing to traditional gender roles of work and care. Citizenship was strongly linked to labour market participation, a prominent distinction between public and private spheres, a lack of public childcare provision, unprotected part-time work, a lack of maternity pay and little genuine acknowledgement of unpaid work. This certainly depicts the UK through the 1980s and 1990s, when the British Government blocked EU directives and recommendations on parental leave, rights for part-time workers and maternity leave (Ostner, 2000). Much has changed since then in the UK, with maternity leave, parental leave and rights for part-time workers now enshrined as law. And there have been other changes, for example the introduction of paternity leave and the right to request flexible working. These changes sit alongside the Government's drive to increase labour market participation, and the promotion of an adult worker model, raising concerns about the relationship between work and care.

1.3.2 Potential of political landscape

As policies are not devised in a political vacuum, the wider political context is important. The election of a Labour government in the UK in 1997 created scope for gender equality to be pursued (Breitenbach, 2002). In contrast with the preceding Conservative

governments, which defined (policies related to) work-life balance within the private realm and not the responsibility of government, Labour's commitment to modernisation, social justice and equality makes 1997 a relevant turning point from which to examine the gender dimensions of work-life balance policies.

In Tony Blair's Third Way doctrine, a vision for society is articulated:

'The Third Way stands for a modernised social democracy, passionate in its commitment to social justice and the goals of the centre-left, but flexible, innovative and forward-looking in the means to achieve them ... My vision for the 21st century is of a popular politics reconciling themes which in the past have wrongly been regarded as antagonistic – patriotism and internationalism; rights and responsibilities; the promotion of enterprise and the attack on poverty and discrimination' (Blair, 1998, p1).

Delivering on this vision and in particular locating paid work and the language of rights and responsibilities at its centre, has raised key questions for the relationship between work and care, with implications for interpretations of equality and citizenship.

Much has been written about the Third Way, its possibilities, its contradictions, and the tensions that it attempts to resolve (e.g. Giddens, 1998; Hills and Stewart, 2005; Levitas, 1998; Powell, 1999; White, 2001). Despite the debate, there are seemingly some common tenets at the core of Third Way politics that guide the Labour government's agenda. Key values that underpin Third Way politics include the centrality of work, balancing rights and responsibilities, the welfare state as guarantor (rather than direct provider), increased partnership, and distribution of opportunities (White, 2001; Powell, 1999).

Arguably, the Third Way has redefined equality and redistribution to be about inclusion and opportunities (e.g. Le Grand, 1998; Powell, 1999). As Anthony Giddens – a key architect of the Third Way principles – has stated; 'the new politics defines equality as *inclusion* and inequality as *exclusion*' (Giddens, 1998, p102). This type of inclusion positions paid work at its centre, with a new welfare contract between the Government

and citizens, focused on balancing rights with responsibilities (DSS, 1998). This arguably promotes a universal breadwinner model where breadwinning is universalised, leading to a tension between treating paid work as a condition for inclusion and recognising the value of unpaid work (Powell, 2000). As many have argued, social inclusion has to be based on more than just labour market participation (Oppenheim, 2001), if it is to genuinely address inequality.

The Third Way's positioning of work as central and the emphasis on promoting and distributing opportunities is critical to this research. The recalibration of equality – to promoting equality of opportunity (Lister, 1998) – and its emphasis on inclusion has increased the significance of work obligations. The value of paid work is highlighted for each citizen (Dean, 1999). Williams (2001, p474) outlines that New Labour presents paid work as the:

- 'first responsibility of citizenship;
- route out of dependency into independence and economic self-sufficiency;
- solution to poverty;
- point of connection that individuals have to the wider society;
- role model to offer children (both for mothers and for fathers);
- glue that binds society together'.

These associations imply that unpaid work (which includes domestic and care work) is inferior. Gendered assumptions about the value attached to different types of work continue to perpetuate a gender gap in work, care and resources (time and money). The emphasis on paid work currently implies that some women (and men) may not be able to fulfil their citizenship 'responsibilities' which may in turn impact on their 'rights'.

Providing choices to balance work with care is one of the ways that Third Way politics attempts to support families and match rights and responsibilities (Blair, 1998). But men

and women are not always able to exercise the same degree of choices, suggesting that the ability to achieve work-life balance is more limited for some than others.

The election of 101 female MPs in 1997, dubbed 'Blair's babes', led to an increased optimism that gender equality would become more prominent. Whilst increased female representation does not necessarily lead to better gender equality outcomes (Phillips, 1998), gender equality was on the agenda. The 'equality' project, which was largely 'privatised' throughout the 1980s and 1990s (Forbes, 1996), is now recognised as a more complex, multi-dimensional and cross-institutional concern (Breitenbach, 2002). Women have disproportionately benefited from the introduction of a minimum wage (as many women are employed in low paid and vulnerable work) (Franklin, 2000a), together with enhanced tax credits, increased provision of childcare facilities, wider parental leave provision policies and increased employment opportunities. But gender equality seems to be a secondary goal, conditional on the strength of the employment agenda that promotes efficiency and fairness as compatible concepts:

'It is perfectly possible to have a modern, flexible and efficient labour market which is both a vital engine for economic growth and business output and a means for people to find well-paid and satisfying jobs' (DTI, 1998).

The flexible workforce that the economy requires to be 'efficient' does not necessarily promote 'fairness'.

The potential offered by the political landscape of a progressive political agenda committed to equality is genuine; and much progress has been made (Annesley, Gains et al., 2007). But there still remain questions about the extent to which Third Way principles can be aligned to gender equality (Franklin, 2000a). The centrality of work and the language of rights and responsibilities have seemingly raised additional questions about the relationship between work and care for men and women.

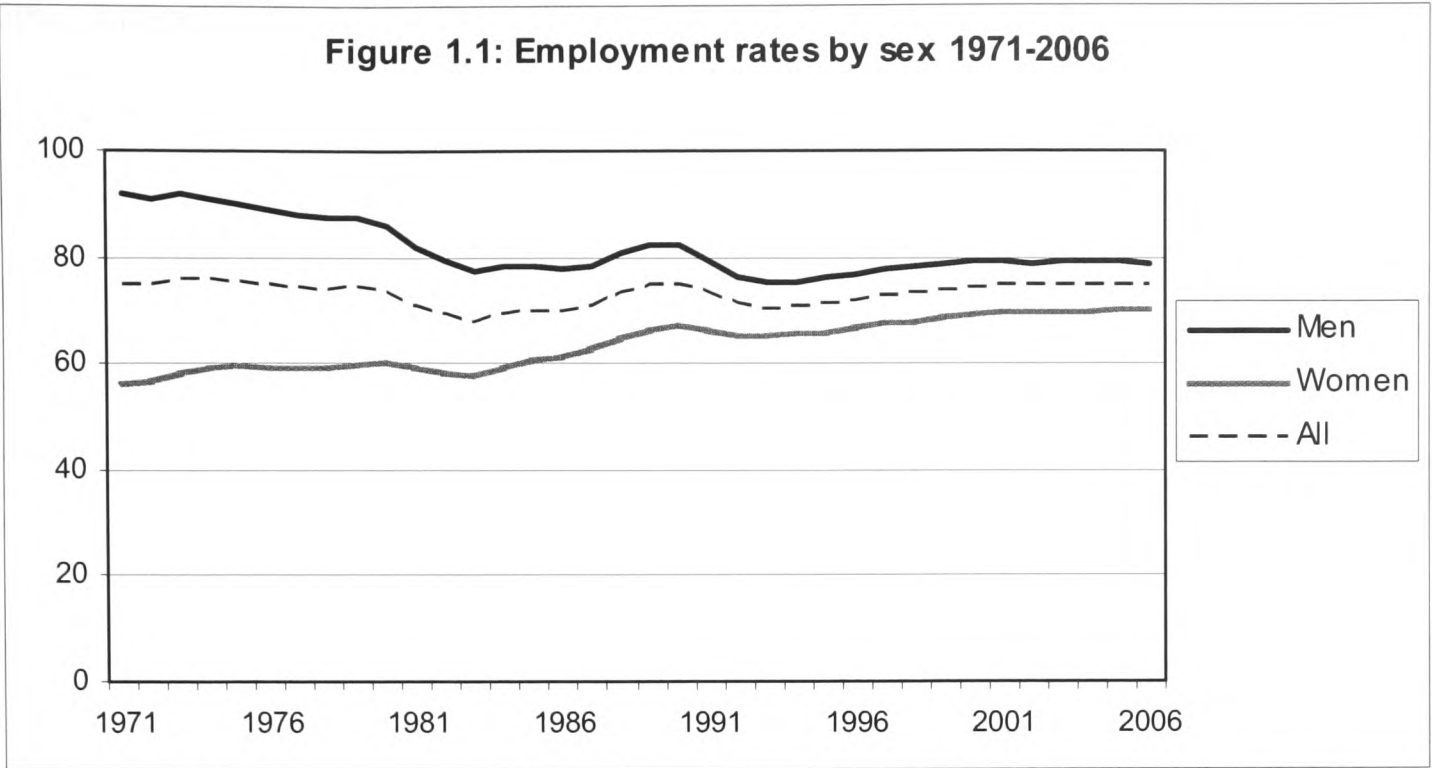
1.4 Demographic, employment and workplace changes

Demographic, employment and workplace changes are cross-cutting and important factors that influence the shape and scope of work-life balance policies in the UK. It is clear that there is an imperative to alter and modernise employment practices and organisations, and that work-life balance policies respond to some of these challenges (Blair, 1998). In this section, some of the complexities that work-life balance policies attempt to address are presented. The section further establishes why work-life balance policies are a necessary part of any potential solution to progress gender equality.

1.4.1 *Changing workforce composition*

The complexity of more households with fewer people, decreased fertility rates, the increase in women's labour market participation, and an ageing population are some of the interacting trends that highlight the need for work-life balance policies. The number of households has increased at a faster rate compared with population growth. Real change occurred throughout the 1970s and 1980s, when there were significant increases in the number of smaller families, lone parent households and one-person households (Self, Zealey et al., 2007). Coupled with these changes were decreasing fertility rates. Although fertility rates have increased slightly since 2001 (and in 2005 were 1.79 children per women), they are still significantly below replacement rate. It is too early to predict whether the increase (between 2001 and 2005) is part of a wider trend (Self, Zealey et al., 2007). Linked to this trend – although causality is difficult to determine – is the increase in women's labour market participation rates.

Figure 1.1 illustrates the changes in employment rates since the 1970s for men and women.



Source: Self et al. (2007, p44). Data from Labour Force Survey (Q2) and seasonally adjusted. Men aged 16-64, women aged 16-59.

Despite fluctuations, the overall employment rate in 2006 was the same as in 1971 at 75 per cent. As Figure 1.1 illustrates, it is the composition of the workforce that has undergone change with women’s labour market participation rates increasing and men’s decreasing since the 1970s. Educational attainment has been one of the most significant factors explaining the increase in women’s labour market participation rates. In 2006, 88 per cent of working-age people in the UK with a degree or equivalent were in employment compared to 46 per cent of those with no qualifications, with the relationship more marked for women compared to men (Self, Zealey et al., 2007). Women’s increased levels of educational attainment seem to have a corresponding positive impact on labour market participation rates. When analysed further, however, there exists an increased polarisation between ‘good’ and ‘bad’ jobs (for women and men) (Hantrais, 2004). In contrast to highly qualified women who are increasing their economic activity in potentially secure and satisfying work, poorly qualified women are often finding themselves in insecure employment (discussed further in Chapter 4). Employment projections estimate that the number of women of working age will increase from 18 million in 2010 to nearly 20 million in 2020. By 2018, it is estimated that the number of working women will overtake the number of working men (Aston, Clegg et al., 2004). It is not yet clear whether this increase will bring about qualitative changes to work, or

whether the polarisation between 'good' and 'bad' jobs will increase widening inequality gaps. As women are seen as both 'key flexible workers in the economy and key care workers in the home' (Franklin, 2000b p139), work-life balance policies are one of the strategies that the UK Government encourages businesses to adopt to address some of the implications of these changes.

An ageing population also highlights the interaction of employment and demographic patterns. Attitudes and experiences towards work and care may change with age. The employment of older workers and the provision of care are critical dimensions which impact on work-life balance policies. The number of workers aged 50 and over is growing. And it is estimated that there are approximately six million unpaid carers in the UK carrying out work worth £57 billion per year. Carers UK suggest that over three million of them juggle caring responsibilities with work (Carers UK, 2004). This has major implications for employers and employees. The right to request flexible working was extended in 2007 to include carers of adults as an acknowledgement of the increasing number of people with caring responsibilities (discussed in Chapter 4).

Changing patterns of employment for older people, pension provision and flexible retirement are all topical issues that further demonstrate the need for work-life balance policies to be considered across a range of groups, as different people have different requirements and responsibilities. Older employees may want to work (but no longer full time), or may need to work for supplementary income and to secure a pension.

Employers can benefit by retaining an employee's knowledge, skills and experience, and reduce recruitment costs. The state can also benefit from prolonging labour market participation. After a period of decline, the employment rates of older workers have increased in the last decade. The employment rate for people aged 50 and above increased from 31 per cent to 37 per cent between 1994 and 2004, with the biggest increase in those between 50 and pension age (Whiting, 2005). The working patterns for

this age group (50-64) vary according to different criteria such as levels of educational attainment and sex. The employment rate (in 2004) for those with a degree or equivalent was 81 per cent, compared with 74 per cent for those with the equivalent of GCSE's and 52 per cent for those with no formal qualifications (Whiting, 2005). Table 1.1 shows the distribution by age, gender and status of part-time and full-time work (of those in employment).

Table 1.1: Proportion of people who work full-time and part-time by age and sex, 2004					
	50-54 (%)	55-59 (%)	60-64 (%)	65+ (%)	Total (%)
Full-time workers					
Men	94	88	77	33	84
Women	58	49	30	14	48
All	77	70	60	26	68
Part-time workers					
Men	6	12	23	67	16
Women	42	51	70	86	52
All	23	30	40	74	32

Source: Labour Force Survey. Data from Whiting (2005, p289).

It is clear from Table 1.1 that the state pension age³ indicates a sharp drop in full-time employment and an increase in part-time employment rates. The needs and desires for those beyond state pension age to remain active in the labour market are perhaps reflected in the high rates of part-time work post state pension age. Although this research is focused mostly on parents – as parents have been the target group for most work-life balance policies – this example of older people demonstrates that the government will need to pursue work-life balance policies that extend beyond parents.

The example of older workers also emphasises the need to examine work-life balance policies from a life-course perspective, where a gender perspective is also valuable. Women and men experience old age differently; many of the differences can be attributed to the gender disparities in the labour market that have a cumulative effect on pensions (Ginn, Street et al., 2001). Women experience poverty disproportionately in old age (Bradshaw, Finch et al., 2003). As life expectancy rises, these issues are

³ The current state pension age is 65 for men and 60 for women. For women, the state pension age will increase gradually to 65 between 2010 and 2020. From 2024, further increases for men and women are planned, so that by 2046 the state pension age will be 68.

increasingly prominent. This evidence adds to the case for approaching work-life balance policies from a life-cycle perspective. It reinforces the need to carefully monitor and analyse anti-discrimination legislation in the area of age, changes to pension provision and the extension of the right to request flexible working to carers.

1.4.2 Parents in the workforce

Perhaps the most significant change in the workforce has been the increase in women's labour market participation (Figure 1.1), and in particular mothers with young children, a large proportion of whom now engage in part-time work. The presence of children does not significantly alter men's employment patterns, although fathers in the UK work longer hours than fathers in many other countries (Fagan, Hegewisch et al., 2006). Part-time work in the UK is the primary method that women – and particularly mothers – utilise to gain flexibility in the labour market (Booth and Frank, 2005). Considered the original flexible working option, part-time work is also used by many employers as a demonstration of their commitment to work-life balance policies, as well as a way to regulate workflow and provide flexibility (Chapter 4). But part-time working does not always benefit both employers and employees. Campaign groups such as Working Families argue that the debate about flexible working cannot just be about business benefits, but should reflect the 'kind of society we want' (Jackson, 2007). The Equal Opportunities Commission (EOC) called for a radical transformation of work and an understanding of flexibility that is multi-dimensional and considers 'not just the familiar dimensions of time and space, but also across individuals' lifetimes and within communities, and it's not just for parents and carers, it's for everyone' (EOC, 2007a).

The presence of children is a key reason why women 'choose' part-time work. Table 1.2 highlights the differences in working patterns for parents. It clearly indicates that fathers have the highest rates of full-time employment and that married / cohabiting mothers and lone parents (mostly mothers) have the lowest. It demonstrates the effect of dependent

children on employment; for men, a dependent child practically implies full-time work (often with long hours), and for women the move into part-time work associated with motherhood and being part of a couple is prominent. It also highlights that the different working patterns between full-time married / cohabiting mothers (30 per cent) and full-time married / cohabiting fathers (87 per cent) is the greatest. The gender gap narrows for people with no dependent children. Data in Table 1.2 also illustrate the differences between partnered parents and lone parents who provide for their children, as both a breadwinner and carer.

Table 1.2: Employment rates of people ^a with and without dependent children ^b : by work pattern and sex, 2006			
	Full time (%)	Part time (%)	All (%)
With dependent children			
Married / cohabiting mothers ^c	30	41	71
Married / cohabiting fathers ^c	87	4	91
Lone parents	30	27	56
All parents ^c	54	23	77
Without dependent children			
Women	51	22	73
Men	64	9	73
All people	58	15	73
Source: Self et al. (2007, p49). Table 4.12. Data from the Labour Force Survey, Q2 and are not seasonably adjusted.			
^a men 16-64 and women 16-59.			
^b children aged under 16 and those aged 16-18 who have never been married and are in full-time education			
^c includes same sex cohabiting couples and civil partners with dependent children			

Table 1.3 provides a further breakdown by age of youngest dependent child. Lone mothers and married / cohabiting mothers are over-represeted in part-time working. The rate of total employment increases substantially once children are of school age. Despite the increase, there is evidence to suggest that employment rates remain below pre-birth rates (Sigle-Rushton and Perrons, 2006). For full-time employment, there is an increase with the rise in age of the youngest dependent child. For part-time work, rates peak when children are 5-10 and then decrease when the youngest child is 11-18. This poses questions about employment choices and preferences, availability of childcare, and the structure and quality of part-time work. Women are taking longer maternity leave breaks and returning to the labour market at higher rates than previously recorded (Smeaton and Marsh, 2006).

Table 1.3: Employment rates of parents by age of youngest dependent child, 2004						
	Married /cohabiting mothers by age of youngest dependent child (%)			Lone parents by age of youngest dependent child (%)		
	Full-time	Part-time	Total	Full-time	Part-time	Total
Child aged 0-4	21	38	59	13	21	34
Child aged 5-10	27	50	77	24	33	57
Child aged 11-18	39	41	80	44	24	67
Adapted from Walling (2005, p282). Source: Labour Force Survey household datasets, people of working age (women 16-59 and men aged 16-64). Children aged under 16 and those aged 16-18 who are never-married and in full-time education. Excludes people with unknown employment status.						

Additional data presented in Table 1.4 based on economic activity rates by age of women and youngest dependent child depicts in more detail the increase in employment rates when the youngest dependent children enter school. It is noteworthy that many mothers find that there are additional benefits from engaging in paid employment such as job satisfaction, increased perceived status, income and that children can also benefit (Dex, 2003).

Table 1.4: Economic activity rates, by age and age and youngest dependent child, 2004				
	16-24 (%)	25-39 (%)	40-49 (%)	50+ (%)
Women aged 16-59				
all	65	75	79	69
youngest dependent child under 5	40	59	60	*
youngest dependent child 5-10	66	74	76	67
youngest dependent child 11-15	*	77	82	72
youngest dependent child 16-18	n/a	86	85	71
no dependent children	77	92	82	69
Men aged 16-64	70	92	91	81
* sample size too small for reliable estimate Source: Labour force survey, 2004. Adapted from Aston et al. (2004, p33)				

Despite rising female labour market participation, women still undertake the majority of unpaid domestic labour and care work (Gershuny, 2000; Lader, Short et al., 2006). And although part-time working is common for women, and especially for mothers with young children, it is not necessarily a ‘choice’. Whilst part-time working offers opportunities to remain attached to the labour market, and does offer some women their preferred option, there are disadvantages commonly associated with part-time working; where women disproportionately absorb the consequences, mostly related to pay penalties and downward career mobility.

According to the *Third work-life balance study*, part-time working opportunities are almost universally (92 per cent) available in UK workplaces (Hayward, Fong et al., 2007).

However, the wider availability of part-time working does not necessarily equate to benefits for both employers and employees. A study undertaken in 2003 showed that the pay penalty for women working part-time was 22 per cent compared with women working full time. Occupational segregation explains much of the penalty, with age, education, household structure, ethnicity, types of employer, types of contract and occupation also important factors (Manning, Petrongolo et al., 2004). About 45 per cent of female workers work part time in the UK (Manning and Petrongolo, 2008). Part-time work opportunities in the UK are polarised into low-pay occupations (Gregory and Connolly, 2008) where few employee benefits and a lack of training and promotion opportunities are other characteristics (Hogg, Harker et al., 1992). Evidence is also presented of occupational downward mobility – ‘a hidden brain drain’ – for women moving from full-time to part-time work, suggesting that many women are not fully utilising their skills and potential (EOC, 2005a; Manning, Petrongolo et al., 2004). Short-and long-term career penalties have also been documented (Rake, 2000). And whilst job satisfaction levels are highest for women working part time, life satisfaction levels are not affected by hours of work (Gregory and Connolly, 2008). Based on this evidence, the high rates of available part-time work do not necessary provide opportunities for women to work at their full potential and has broader implications for the economy.

The Women and Work Commission was established partly to respond to these issues. Its findings reiterate the lost earnings and penalties suffered by women in the workplace and estimate that removing barriers to women’s employment ‘could be worth between £15 billion and £23 billion or 1.3 to 2.0 per cent of GDP’ (WWC, 2006, p7). These gender disparities demonstrate the necessity of a gender dimension in any work-life balance discussion. Current work patterns potentially reinforce notions of ‘the ideal worker’ and ‘the ideal carer’ in the UK, with long hours for fathers and part-time work for mothers.

1.4.3 *The nature of work*

Changes in the nature of work have also influenced the development and scope of work-life balance policies. Analysis of job structures and workplace relations cannot be isolated from issues of gender (in)equality: ‘the very nature of jobs and the organization of the labour market are intimately tied to the nature of gender relations within the family’ (Wajcman, 2000, p196). Work structures, jobs and decisions about work all have gender dimensions. Implications of the changing workforce composition outlined earlier in this chapter combine with qualitative and quantitative dimensions of the transformation of work.

Throughout the 1980s and 1990s, organisations were faced with major changes that focused on maintaining a competitive advantage. Organisations were forced to respond to a variety of challenges that included globalisation, the need to increase revenue and decrease costs, building organisational capacity and developing human capital (Burke and Cooper, 2005). In addition, the structure of the labour market had also undergone change. The decline of the manufacturing sector and growth of the knowledge economy and service sectors – the ‘new economy’ – emerged, with associated gender implications. Although the parameters of the ‘new economy’ are contested, key dimensions include organisations changing as a result of enhanced ICT⁴; knowledge-based and service sector employment displacing many jobs in the manufacturing sector; increased spatial and temporal work flexibility; and widening social divisions (Edwards and Wajcman, 2005; Perrons, Fagan et al., 2006).

Traditional work boundaries of space and place are more porous for more workers, creating new opportunities and challenges. Technology and globalisation have arguably propelled flexibility, allowing people to alter when and where they work to varying degrees – but in doing so, may also have led to an intensification of work, given that the

⁴ ICT is a commonly used acronym referring to Information Communications Technology.

proximity between the workplace (which may be virtual) and the home may have decreased (Crosbie and Moore, 2004; Edwards and Wajcman, 2005). As practices such as home-working become more common – particularly amongst parents – boundaries increasingly overlap, potentially challenging traditional spheres of work and home with the potential to unsettle gendered notions of parenting (Halford, 2006).

The nature of work itself has also altered, with the intensification of work as well as changes to the human resource agenda which have influenced the scope of work-life balance policies in the workplace. Green (2001) identifies that there has been an intensification of work throughout the 1980s and 1990s, whereby working hours have been concentrated into fewer households, and there has been an increase in stress and pressures in the workplace. Organisational change agendas shaped by human resource management (HRM) theories have also been significant in the same period (White, Hill et al., 2004).

HRM is a concept that emerged in the UK in the 1980s, replacing personnel management. Influenced by the US management literature, the modified focus was to adopt management practices 'in search for competitive advantage' (Legge, 1995, p77) and to find the best fit between jobs and knowledge (Nel and Van Dyk, 2004). HRM approaches have led to a variety of changes in practice such as devolved management, increased diversity management and the prevalence of performance indicators. The changes in organisational structures also led to 'delaying', whereby traditional pyramid organisational structures were replaced with flatter (hierarchical) structures, often making middle management redundant; and an increasing number of services were outsourced. The result of these changes has meant that 'rungs from the internal job ladder' have been removed, reducing opportunities for career progression (Grimshaw, Beynon et al., 2002, p91). The specific political climate in the 1980s of neo-liberal values with an individual focus, offered ripe conditions in which to promote entrepreneurship and the

individual potential benefit of each employee to their employer. Based on these neo-liberal values, the 'managing diversity' approach evolved as a way to harness this individual potential (Chapter 2).

In practice, HRM also changed the nature of representation in organisations.

Organisational changes had meant that trust in a 'trust no-one' era, alongside empowering a representative occupational voice, as well as the value of partnerships became key dimensions to drive productivity (Sparrow, Marchington et al., 1998).

Optimistically, HRM practices offered a sense of coherence, and breaking with past approaches (Guest, 1998), meaning that many employers perceived that they had the 'choice' and 'opportunity' to search for the most productive, efficient and committed labour force (Webb, 1997). However, from a gender perspective, HRM practices are criticised for their gender neutrality in ignoring the way that key components in organisations, such as organisational commitment, flexibility and performance management, perpetuate rather than challenge gender inequalities (Dickens, 1998). The emergence of HRM – under which many policies are at the discretion of line managers, and provided on an individual basis, rather than collectively – coincided with changes to industrial relations and the changing role of unions.

Trade union visibility, which includes membership rates and its representative voice, decreased throughout the 1980s and 1990s (Metcalf, 2001), arguably altering the employer-employee relationship.

'The decline in collective bargaining coverage, union density and strikes means that these can no longer be the central preoccupations of those working in the field. The focus has extended from the management of industrial conflict to a concern with the employment relationship more broadly' (Wajcman, 2000, p183).

This has a direct impact on bargaining and negotiating power, particularly for those in lower-paid jobs – who tend to have the least bargaining power in relation to salary (Hardy, 2001). Metcalf (2001) argues that the presence of unions in a workplace, amongst other outcomes (such as lowering the accident rates), also narrows the

distribution of pay and promotes equal opportunities and family-friendly policies. The question of whether it is reasonable to extend this premise to diversity – as diversity is perceived to be more dynamic and less controversial compared with some equal opportunities policies – is considered in Chapter 2. The changes in industrial relations further contribute to a growing polarisation between ‘good’ and ‘bad’ jobs, for example with the increase of low-paid jobs in the service sector. Work and organisations are shaped by these changes and obviously impact on the ways that individuals negotiate and organise working life with other commitments.

Many of the changes in work described above were most pronounced throughout the 1980s and 1990s. Projecting future work trends requires consideration of a vast range of employment experiences and opportunities (Nolan and Wood, 2003). There is seemingly consensus about the number of jobs increasing, although less agreement on who will take these jobs and what type of jobs they will be (Walby, 2007). It seems inevitable that flexible work opportunities will continue to be enhanced, probably through advances in technology. Jones, Visser et al. (2007, p51) outline that a new understanding of flexibility will be required, which is similar to that defined by the EOC:

‘Flexibility is about having sufficient autonomy and control to be able to adapt how, when and where we work to get the job done in a way that works for the individual, the customer and increases the productivity and efficiency of the organisation’.

This may continue to blur boundaries between home and work. It may however, enable more people ‘to fit work into their life, rather than having to fit their lives around work’ (Holmes, Ivins et al., 2007, p7).

Other predictions include the continued rise in portfolio careers, and that strategies to enhance co-operation between colleagues will be developed and promoted (Walby, 2007). Although changes in the future may be conducive to better ‘work-life balance’,

within the current constraints of a gender segregated workforce, changes are unlikely to be able to challenge existing gender inequalities.

1.4.4 Gender segregated workforce

The analysis thus far has demonstrated that, despite high rates of labour market participation in the UK labour force, gender disparities exist. Many employees (and potential employees) are not able to exercise genuine choice – an aspiration of gender equality – due to a range of constraints. The UK's labour market is highly gender segregated, both horizontally and vertically. Traditional gender roles and stereotypes persist. Sectors such as construction are dominated by men, whereas health and education are female-dominated (EOC, 2006b). Women are still under-represented in positions of leadership such as directors of FTSE 100 companies (10.4 per cent), members of parliament (19.5 per cent) and civil service management (26.3 per cent), indicating vertical segregation (EOC, 2007c). These inequalities are compounded by other equality dimensions, such as ethnicity or disability, where wider inequalities are reported (EOC, 2007c). These inequalities contribute to perpetuating a gender pay gap, where although the full-time gender pay gap has been narrowing, it is still 17 per cent, with the pay gap between female part-time workers and full-time male workers a staggering 38 per cent (EOC, 2006b). Progress towards gender equality has been slow given that sex equality legislation has existed for over thirty years.

Whilst work-life balance policies should not and cannot address all these questions, they have potential as one of a range of tools to address gender inequality. The distribution of money, services and time is a central part of the equation (Lewis, 2001; Lewis and Giullari, 2005).

1.5 Focus of the thesis and key research questions

This thesis has a strong policy focus. Bonoli (2005) has defined the juggling of work and life as a 'new social risk' in post-industrial welfare states, with those unable to do so at risk of poverty and social exclusion. As discussed earlier, the UK Government's work-life balance agenda supports a number of broader aims such as increasing employment rates, reducing child poverty and increasing childcare provision (Dex, 2003). Gender equality is also an aim, but is often more incidental than explicit (OECD, 2007).

Therefore, the way that work-life balance policies are conceptualised and implemented to create opportunities for men and women to engage in paid and unpaid work affects a broad range of outcomes.

The first research question focuses on the extent to which work-life balance policies are framed by diversity. The concept of diversity has various origins, which in turn generate different meanings with implications for policy. For example, as well as being seen in the feminist literature as a way to reconcile divisions, diversity has been seen as a way to increase social cohesion in increasingly pluralist societies (McGhee, 2006), and as a human resource management strategy (Thomas, 1990). Which diversity discourse – that which emanates from the feminist literature, from the race and ethnicity literature, or from the human resource management literature – proves most influential with policy-makers, and how the various discourses inter-relate, will impact on the conceptualisation and implementation of work-life balance policies.

The second research question explores how the specific framing of diversity shapes work-life balance policies in the UK. As well as drawing on the published literature, this question is explored through analysing government documents and organisational case studies. Work-life balance policies are now an established feature of the political landscape. Since 1997, the Labour government has introduced a range of measures in the area of work-life balance policies, including extending maternity leave and

introducing paternity leave, as well as implementing a right to request flexible working. The UK Government frames diversity and work-life balance policies in the context of maximising the individual's potential in the workplace and its approach is based primarily on the business case. This approach suggests that dimensions associated with a 'managing diversity' framework, such as emphasising a gender neutral worker, will be common in policy implementation.

The third question draws on the emerging research findings to explore the gender implications of work-life balance policies. Work-life balance policies have facilitated employment opportunities for women and have provided a range of different policies to help men and women to 'work' and 'care', arguably extending the work-life balance remit beyond parents, and recognising that people have a variety of roles and responsibilities. This question will explore whether this conceptualisation and implementation is limited. It will focus specifically on whether in prioritising the 'managing diversity' discourse and in particularly individual choice, work-life balance policies are able to challenge persistent gender inequalities.

1.6 Structure of thesis

Drawing on feminist concepts and interpretations of equality, Chapter 2 outlines understandings of diversity in theory, policy formulation and organisational implementation. The feminist literature demonstrates that diversity offers the theoretical potential to overcome the same-difference dichotomy that has plagued progress towards gender equality. Diversity further offers the potential to recognise multiple aspects of identity and how they intersect (Crenshaw, 1989). This chapter explores the extent to which these feminist concepts have been translated into practice.

It seems that despite the many definitions and interpretations of diversity in theory, the most common in application in the UK is 'managing diversity', which emphasises the

potential contribution from each individual. This emerges as potentially problematic for progress towards gender equality, as it may sidestep structural labour market gender inequalities. Through analysing the feminist discourse of diversity and the policy trajectory of the diversity narrative (in the EU and UK) and in organisations, Chapter 2 explores the potential of the diversity discourse for the conceptualisation and implementation of work-life balance policies. In doing so, the extent to which work-life balance policies are shaped by the diversity context – as well as possible implications – can begin to be understood and applied.

Chapter 3 outlines the research strategy deployed and provides evidence to support it. It suggests that the chosen methods provide a robust framework to analyse the gender dimensions of work-life balance policies as framed by diversity. The research core of the thesis is identified as a two-stage process. The first stage involves a documentary analysis of government policy documents, with the second stage providing three case studies organisations⁵ to illustrate implementation. In addition, a literature review supports this research and provides a relevant framework for analysis. The literature review is divided into two main components: tracing the development of the diversity approach through the equalities framework, and understanding the development of work-life balance policies in the UK context. Advantages and limitations of the research strategy are also discussed.

The UK's work-life balance agenda is presented and evaluated in Chapter 4, with the purpose of understanding its nature and the opportunities and limits that it offers in the UK to employers and employees. The chapter presents evidence that work-life balance policies are located in the diversity context outlined in Chapter 2. The chapter traces the evolution of the work-life balance narrative in the UK from 'flexible working' to 'family-

⁵ The participating case study organisations are a Central Government Department (CGD), an Arm's-Length Management Organisation (ALMO) and a Financial Services Company (FSC).

friendly' and some of the opportunities and limitations offered by the 'work-life balance' narrative that is most commonly used in the UK.

The UK Government's approach to work-life balance policies is also considered in Chapter 4. As already discussed, the election of a Labour government in 1997 is considered a turning point, signalling the development of a more coherent work-life balance agenda. Numerous policies have been introduced since 1997 such as increased maternity leave, the introduction of paternity leave and a right to request flexible working for some parents (and more recently for carers of adults). However, tensions emerge between policies being for everyone and policies supporting parents. The implications of this tension are explored. The conceptualisation of the work-life balance agenda is considered first, before the case studies analyse its implementation in practice (Chapters 5 and 6).

Chapter 5 shifts the focus to the case study organisations analysing how equality and diversity are conceptualised and implemented in organisations and discussing the implications for gender equality. It is based on data collected from the three organisational case studies. It explores how the foundations of equality and diversity (identified in Chapter 2) are interpreted by organisations in practice. Reflective of wider trends, the case study organisations had extended their equality remit to comply with legislative requirements, and adopted the language of a 'managing diversity' approach. The chapter explores the implications of the emphasis on the business case and its focus on the individual worker. It suggests that in application, such an approach based on diversity may not succeed in overcoming the same-difference dichotomy, shape policies to address intersecting inequalities or overcome structural gender inequalities. Diversity does indeed offer benefits to an organisation, but progress towards substantive gender equality is limited.

Drawing on data generated from the case studies, Chapter 6 focuses more explicitly on work-life balance policies. This chapter explores how work-life balance policies are implemented – based on the context outlined in Chapter 4. Gender dimensions of work-life balance policies are also considered. All the case study organisations are committed to gender equality, and all have comprehensive and often creative work-life balance policies in operation. Alongside this progressive framework, gender disparities exist in each of the case study organisations, with very few women in senior management and very few men working part time. These gender disparities are common in organisations more broadly. In these case study organisations (as is probably the case in other organisations), a lack of awareness in linking these trends to gender inequalities was evident. The research explores the extent to which organisations are ‘gender-blind’ – lacking a comprehensive consideration of wider gender inequalities or gendered aspects of organisational culture (Haas and Hwang, 1995; Smithson and Stokoe, 2005) – and the implications for gender equality.

Questions about whether work-life balance policies are gendered in application are also explored in Chapter 6 in terms of eligibility criteria and accessibility. It particularly explores how organisations interpret the Government’s work-life balance agenda and whether provision is skewed (intentionally and unintentionally) towards mothers.

The final chapter, Chapter 7, brings together the major findings of this research and looks towards the future application of work-life balance in terms of gender equality goals. It is suggested that gender disparities in the workplace and in the home need to be recognised in the conceptualisation and implementation of work-life balance policies if they are to address gender inequalities.

Work-life balance policies are clearly necessary and relevant in today's society. There is scope to progress gender equality through them. Whilst advances are being made, arguably the potential of work-life balance policies has not yet been realised. The Government and organisations need to examine how they conceptualise and implement work-life balance policies in order to genuinely progress gender equality.

2.0 EQUALITY: SHAPING THE UK'S DIVERSITY DISCOURSE

2.1 Introduction

Diversity has become a common approach to progress gender equality in both theory and application. It is widely recognised that diversity has the potential to advance gender equality (Squires, 2005; Walby, 2005). Feminist theorists of gender have suggested that diversity may offer a new approach to gender equality, by celebrating and recognising different components of identity (Squires, 1999). However, the concept has various origins, which in turn generate different meanings, with different implications for policymaking. For example, as well as being a way to reconcile divisions in the feminist literature, diversity has been seen as a way to increase social cohesion in increasingly pluralist societies (McGhee, 2006), and as a human resources management strategy (Thomas, 1990). Both of these offer examples of how diversity is something to be managed, as well as something to be recognised and celebrated. In practice, work-life balance policies are often located in a diversity framework. The nature and mix of diversity that proves to be influential in theory and practice will shape the scope and impact of work-life balance policies.

This chapter examines the emergence of diversity in understandings and applications of equality, in particular gender equality. Drawing on feminist concepts and interpretations of equality, this chapter outlines the evolution of diversity in theory, policy formulation and implementation. It demonstrates that diversity offers the theoretical potential to overcome the 'same-difference' dichotomy that has plagued progress towards gender equality, but that in practice this potential is not necessarily harnessed. Despite the many definitions and interpretations of diversity in theory, the most common in application in the UK is 'managing diversity', which emphasises the potential contribution from each individual. This is problematic, as it sidesteps structural labour market gender inequalities that limit progress towards gender equality. The chapter further suggests that this current

conceptualisation of diversity has the potential to dilute progress towards gender equality.

The chapter begins with establishing the place of the diversity discourse in relation to, and as an evolution from, the binary positions of 'gender sameness' and 'gender difference'. It then analyses the policy developments that have shaped the diversity discourse in the UK that focus on gender equality strategies in the EU and UK, an expanding equalities remit, and employment being a central driver. The gender equality strategies in the EU have mirrored the theoretical trajectory. Gender mainstreaming emerged in the mid-1990s as a strategy to consider gender in all policies and processes, potentially providing an opportunity to overcome the limitations inherent in previous equal opportunities approaches to gender equality. The discussion considers the success of the EU's equality agenda as well as how it has influenced the development of gender equality approaches in the UK. The chapter then considers the influence of an expanding equality remit, guided by EU legislation, and in particular the decision to create an Equality and Human Rights Commission (EHRC)⁶ in the UK, which in part attempts to define equality in terms of 'capabilities'. Whilst it has only been operational since October 2007, the EHRC offers scope to pursue gender equality aims, as a capabilities approach has the (theoretical) potential to promote genuine choices – a key component to the achievement of gender equality. In addition, the chapter suggests that the focus on employment, and in particular the European Employment Strategy (EES), with specific employment targets to increase women's labour market participation have significantly influenced the diversity discourse in the UK. These policy developments combine to define the nature and scope of diversity in the UK context. In shaping the diversity context in the UK, these factors have contributed to the specific remit and objectives of work-life balance policies.

⁶ The Equality and Human Rights Commission (EHRC) became operational on 1 October 2007 merging the Equal Opportunities Commission (EOC), Commission for Racial Equality (CRE) and the Disability Rights Commission (DRC). Before this date, it was referred to as the Commission for Equality and Human Rights (CEHR).

The second part of this chapter analyses diversity in an organisational context. The particular emphasis is on the relationship between gender, work and organisations. The 'managing diversity' discourse is highlighted as it has become a prominent strategy in organisations. Largely influenced by the US narrative on workplace changes, the focus on harnessing the potential of each individual employee is key. Equality policies in the workplace have reflected the trajectory of gender equality – both in theory and in practice. This analysis argues that in the context of gendered organisational cultures, a 'managing diversity' discourse cannot adequately pursue an equality agenda.

The UK equalities discourse has evolved. This evolution is not without its benefits; but the limitations suggest that the theoretical potential offered by diversity has not yet been realised in application. As work-life balance policies are often located within a diversity approach, the evolution towards a diversity context establishes the foundations from which it is possible to examine the gender implications for work-life balance policies.

2.2 Sameness, difference and diversity: The theoretical context

A critical debate within the gender equality discourse focuses on whether the pursuit of gender equality should be based on gender 'sameness' or 'difference'. The 'Wollstonecraft dilemma' (Pateman, 1989) articulates the long-standing problem of 'whether gender equality requires de-gendering or the equal valuation of different contributions by women and men' (Squires, 2005, p369). Feminists argue for equal rights but at the same time recognise women's differences. This tension is summarised by Lister (2003, p93) in relation to citizenship, where the same contradiction is evident:

'Women's exclusion from citizenship has, both historically and today elicited two main responses, either to demand inclusion on the same terms as men, as equal, supposedly "gender neutral", citizens, or to press the case for the recasting of citizenship's premises so as to accommodate women's particular interests and acknowledge them as "gender-differentiated" citizens'.

The positions of sameness and difference constrain gender equality conceptually, and have often been defined as opposites. The position of sameness, namely pursuing equal rights for women, stems from the liberal tradition of equality and fairness. In Mary Wollstonecraft's text, *A Vindication of the Rights of Women* (Wollstonecraft, 1792 republished 1992), she argued that a woman (like a man) has an innate capacity to reason. The assertion that women are rational creatures, with the emphasis that the surrounding environment and social norms rather than biology have greatly contributed to woman's subordinate position in society, is fundamental. Nussbaum (1999, p57) has summarised the key dimensions of a liberal conceptualisation of equality, 'that all are of equal dignity and worth, no matter where they are situated in society'. She continues that liberalism must 'respect and promote the liberty of choice, and it must respect and promote the equal worth of persons as choosers'.

Liberal theory distinguishes the public sphere from the private sphere, where the private is 'used to refer to sphere or spheres of social life in which intrusion or interference with freedom requires special justification, and "the public" to refer to a sphere or spheres regarded as more generally or more justifiably accessible' (Okin, 1998, p117). Feminist scholars criticise this distinction. For example, Pateman (1988) challenges the separation of public and private domains espoused by liberal philosophy, asserting that the dominance of the patriarchy is maintained through the separation of spheres and that the public-private dichotomy reflects the subjugation of women in their exclusion from the public sphere.

Feminists have criticised this conceptualisation of equality with its reliance on liberal theory. There is a disjuncture between the central tenet of liberalism to treat everyone equally and the oppression of women in society (Phillips, 2001). Other feminist critiques of liberalism include that it is too individualistic; that the ideal of equality that liberalism promotes is abstract and formal; and that liberal philosophy, with its focus on rationality

and reason, neglects the role of care (Nussbaum, 1999). Additionally liberal understandings of equality are said to often only reflect the concerns of middle-class white women, rather than those of women more generally (Bryson, 2003).

This position of 'sameness' has been primarily translated into equal opportunities policies – both in legislation and workplace policies. The term 'equal opportunities' is used to refer to laws, policies and practices (Breitenbach, 2002). The framework of equal opportunities stresses 'the importance of treating people equally irrespective of their sex...' (Liff, 1997, p12). The Sex Discrimination Act and the Equal Pay Act have been the main legal instruments in the UK. In organisational settings, the focus has been on recruitment and career progression. The focus on equal treatment has raised concerns for the pursuit of gender equality (discussed below).

As a response to some of these conceptual limitations, ideas based on gender differences that construct separate gender identities for 'men' and 'women' draw on understandings that 'sex *is* a difference, a distinction ...' (MacKinnon, 1998, p296). Women are categorised as having greater emotional capacity and men are perceived to be primarily rational actors. Biological differences are also recognised. But the category of 'women' needs to also recognise the many forms of differences within it. Policies aligned to this position of 'difference' strive towards an equality of outcome and often include quotas, positive discrimination / affirmative action and positive action. These strategies attempt to increase the participation of under-represented groups and focus on outcomes. Positive action attempts to equalise starting positions, to allow the under-represented group – in this case women – to compete more effectively (Rees, 1998). Strategies assume 'difference', that is membership of a specific group may affect outcome. Measures have been focused on identifying barriers and in particular on education and training (Rees, 1998). Positive discrimination / affirmative action are more contentious as they seek to 'redress uneven balances' based on the existence of

discrimination (Rees, 1998, p37). These strategies are not legal in the UK, and are stigmatised for providing people with 'special treatment' to access employment. These tensions – between sameness and difference – direct feminists towards conceptualising a type of equality where a dichotomy is not the central feature.

Commentators such as Squires (1999; 2005) and Lister (2003) have challenged this dichotomous thinking, adding that it is only when equality is defined as 'sameness' that equality and difference are antithetical and that the opposite of equality is inequality, not difference. Scott (1992, p765) highlights that the opposition of 'same' to 'difference' encourages feminists to prefer one position over the other. And Rhode (1998) argues that an approach based on disadvantage (rather than difference) would provide a more considered understanding of the context and history that led to these different inequalities.

A trend has emerged within the theoretical literature to move beyond these restrictive binary positions as they present a false dichotomy and an 'impossible choice' (Scott, 1992, p765). Approaches and strategies vary, but mainly deconstruct, synthesise or attempt to transform these positions. For example, Phillips identifies the need to think about 'a plurality of many differences, so that equality becomes compatible with diversity' (Phillips, 1992, p20), to allow for a more reflective understanding. Lister (2003) also advocates moving towards pluralist rather than dualist positions, recognising the heterogeneity within groups of women and men as well as other aspects of identity. And Rhode (1998) argues that the celebration of women's differences (compared to men) has obscured women's differences from one another, such as race and class, stating that 'the same / difference dilemma cannot be resolved: it can only be reformulated'. These all recognise a role for diversity.

2.2.1 Diversity: The opportunity to overcome sameness-difference dichotomy?

The concept of diversity offers the possibility to overcome many of these problems, by moving the discussion beyond the sameness / difference dichotomy. There is further scope to focus on the structural reproduction of gender inequalities (Squires, 2005). Both positions of sameness and difference have increasingly had to recognise the problem of constructing men and women as homogenous groups. Not all women or men are the same, and strategies to address 'women's political, social and economic disadvantage' require a range of policy measures to capture differences between people (Lister, 2003). In contrast to being a 'man' or a 'woman', diversity allows for a heterogeneous understanding of identity and the various components that comprise it.

The increasing focus on the diversity discourse is also representative of a shift towards multiculturalism, with groups able to forge their own identities rather than assimilate into the dominant mainstream culture. Although a range of definitions exist for multiculturalism, it can broadly be defined as protecting the rights of communities / cultures and the individuals within them. According to Parekh (2000, p3), multiculturalism is 'not about difference and identity *per se* but about those that are embedded in and sustained by culture', and refers to the beliefs, practices and / or customs that a community draws on to understand themselves and organise their lives. Similar to the feminist discourse, the issue of group identity versus individual rights emerges (Kymlicka, 1995). This becomes an increasingly complex remit when translating theory into policy (as discussed below in the context of the EHRC). Whilst the potential impact that a diversity discourse can have on multiculturalism and community cohesion is recognised, this is a different type of diversity. This interpretation of diversity is often linked to people's differences, whereas gender diversity, whilst incorporating that aspect, is also about transforming the sameness-difference dichotomy. Whilst there is some overlap between these interpretations, this research focuses on exploring the scope of diversity

in relation to gender and in particular how diversity is interpreted and used to pursue gender equality aims.

As an awareness of the relationship and intersections between gender, ethnicity and class entered the political discourse, the concept of diversity further developed (Anthias, Yuval-Davis et al., 1992; Yuval-Davis, 2006). The notion of 'intersectionality' emerged from this wider understanding of identity and how inequalities are perpetuated (Crenshaw, 1989; Yuval-Davis, 2006). The idea of intersectionality rests on assumptions that categories such as race and gender are socially constructed, and do not represent separate analytical concepts. And so, in addition to gender being racialised and race being gendered, other aspects of identity, such as class, sexuality and disability, should also be added to this matrix. Intersectionality extends gender analysis away from a uni-dimensional understanding of inequality towards a more complex lens for analysis (Browne and Misra, 2003, p489).

Feminists also challenged the perceived dominance of the middle-class white woman's narrative, arguing that a 'black' woman experiences a qualitatively different type of oppression from that of a 'white' woman. Crenshaw (1989) asserted that multiple discrimination could not simply be additive, but rather was qualitatively different. Indeed, the concept of intersectionality is particularly relevant for gender, as disadvantage is often the result of multiple and intersecting factors (Fredman, 2005). For example, published research demonstrates vast differences in economic activity between women of different ethnic groups. 'Bangladeshi' and 'Pakistani' women have the lowest rates of economic activity in Britain and experience a wider pay gap compared to 'White' women (Dale, Lindley et al., 2006). Before merging into the EHRC, the Equal Opportunities Commission published a report entitled *Moving on Up?* (EOC, 2007b), documenting that 'culturally intelligent public policy' was often lacking, and the potential contribution of minority ethnic women often absent from debates on community cohesion, integration

and employment. Factors such as gender (combined with ethnic) stereotypes and different constructions of motherhood interact differently for different women. Therefore, more nuanced data are required to capture some of these complexities, rather than seeing women as a homogenous group.

Theoretically, this understanding of diversity based on overcoming the entrenched binary dualism of sameness and difference can address multiple identities and cumulative disadvantage, which previous equality approaches could not. Despite this scope, policy developments thus far suggest that the theoretical promise offered by a diversity discourse for gender equality has not yet materialised, and the current policy trajectory suggests that the potential may not be realised.

2.3 Policy developments shaping UK diversity

Whilst in theory the diversity narrative has the potential to progress gender equality, in practice different challenges need to be considered. The UK Government is simultaneously bound by EU law and attracted to the US's liberal approach to employment (Duncan, 2002). The following outlines how these influences shape diversity for the UK. In this section, the components explored analyse the gender equality trajectory and the expanding equality remit in the EU. Both of these have influenced how the UK has shaped its gender equality agenda and within that work-life balance policies (discussed in Chapter 4).

2.3.1 EU-UK: Gender equality trajectory

Over time, definitions and understandings of gender equality in the EU and UK have evolved reflecting the theoretical development (outlined above). The Treaty of Rome (1957) established the foundations of gender equality policy in the EU. Article 119 of the Treaty contained a commitment to equal pay for women. However, Article 119 was included primarily because of French economic concerns, rather than to further equality

aims (Hoskyns, 1996). EU action and policy in the area of gender equality were not active until the 1970s. However, Article 119 offered potential, as its place in the Treaty – in the remit of social policy, but with the language of economic competition – provided additional strength when it was translated into equality aims (Hoskyns, 1996).

Throughout the 1970s, a number of Directives expanding the remit of equal opportunities were adopted.⁷ Directives (75/117/EEC equal pay, 76/207/EEC equal treatment to employment and 79/7/EEC social security) were informed by an interpretation of equal opportunities to mean equal treatment between men and women based on notions of gender sameness (Gregory, 1987). Combined with a ruling in 1976 by the European Court of Justice (ECJ) on the 'direct effect' of Article 119, these Directives created a new platform from which to pursue equal opportunities aims within the EU (Rossilli, 1997).

These Directives have been evaluated with different levels of optimism. The limitations reflect some of the conceptual barriers identified previously. For example, EU policy often treats women as a homogeneous group, not recognising the diversity of women (and men). Furthermore, implementation in EU member states has been piecemeal, the Commission has few mechanisms to monitor implementation, and national policies differ (e.g. Pillinger, 1992). In limiting EU equality law to the public sphere of employment, Rossilli (2000) argues that it perpetuates both 'citizenship' and 'democracy' deficits, especially as unpaid workers are not considered to be on a par with full-time paid workers. Lombardo (2003) criticises the implementation of EU equality policy for not recognising – and subsequently tackling – the material causes of gender inequalities, such as disparities in care provision and pay.

⁷ An updated list of EU Directives is available from:
http://ec.europa.eu/employment_social/gender_equality/legislation/legalacts_en.html (accessed March 2008)

Action Programmes⁸ were introduced in the 1980s to complement existing measures, as well as to ensure that gender remained on the EU's agenda. Action Programmes included 'softer' policy approaches – leaving member states with scope to decide how to implement EU recommendations (Hantrais, 2007) – rather than Directives that are incorporated into national law. Hoskyns (2000) analysed the equal opportunities Action Programmes, claiming that they were often compromises between the European institutions and competing interests of Member States. Optimistically, Action Programmes could be evaluated as a 'necessary prerequisite to the establishment of *substantive* equality' (Mazey, 1995, p592) that introduced mechanisms such as positive action in the EU. But, given their non-binding nature, their impact was limited (Hoskyns, 2000; Mazey, 1995). Irrespective of the preferred equality strategy, the equality remit of the EU has been restricted to economic and employment matters. Combined with a conceptualisation of equality largely based on 'sameness' and supported by equal treatment policies, this has meant that arguably gender equality policy has been narrowly focused and applied.

Changes at the EU level are significant in the way that the UK has approached gender equality and as a result the components that comprise the diversity discourse. The UK has had a fraught relationship with the EU in relation to sex equality legislation. Gender policy is subject to both 'needles' eyes' whereby policy needs to pass through EU institutions, and the culturally specific and gendered nature of individual Member States (Ostner and Lewis, 1995). The UK has traditionally been seen as 'fiercely opposed' to its equal opportunities obligations within the EU framework (Beveridge, Nott et al., 2000). Sex equality legislation in the UK is dominated by a conceptualisation of equality based on equal treatment. The Equal Pay Act (1970)(EqPA) and the Sex Discrimination Act (1975)(SDA) were influenced by developments in the US civil rights movement,

⁸ 1982-1985 First Action Programme – equal opportunities for women; 1986-1990 Second Action Programme – equal opportunities for women; 1991-1995 Third Medium-Term community action programme on equal opportunities; 1996-2000 Fourth Medium-term community action programme on equal opportunities for women and men. 2001-2005 Fifth Action Programme – community programmes on gender equality.

extending the scope of the legislation beyond the modest intentions of the Government at the time (Lovenduski, 1989). The EqPA provides the opportunity to claim equal pay for similar work or work of equal value for individuals. The main weaknesses identified through the legislation are the requirement to find a (male) comparator, which is difficult in the context of high levels of gendered occupational segregation (Cockburn, 1991), and that it is less likely that a man will utilise the EqPA because of the disparity in men's and women's pay (Bagilhole and Byrne, 2000). The EqPA was the intended mechanism to implement the EU's Equal Pay Directive, but it was controversial. The European Court of Justice (ECJ) initiated legal proceedings against the UK (in 1979) for failure to provide the necessary mechanisms through which a claim could be made for equal pay for work of equal value (Pillinger, 1992). Although the British Government disagreed with the ECJ ruling, it eventually amended the equal pay legislation in 1983 (Bagilhole and Byrne, 2000). Likewise, the SDA required amendment resulting from EU pressure to extend protection to wider employment provisions (Bagilhole and Byrne, 2000). This reluctance to implement EU equality Directives in full was a persistent feature of the British Government's approach.

Throughout the 1980s and early 1990s, Conservative governments blocked numerous EU Directives and recommendations related to gender equality as it saw them as too prescriptive. Directives on parental leave, rights for part-time workers and maternity leave were all areas in which the Government exercised its veto. Arguably, British resistance has been a major obstacle to EU policy (Ostner, 2000). In the UK, the opt-out from the Maastricht Treaty's Social Chapter and the Conservative government's hands-off attitude towards gender issues meant that it was only after Labour's election victory in 1997 that significant change in gender policy could be expected. After the gender policy vacuum under the Conservatives, a sense of optimism prevailed: as the EOC stated, 'in 1997, one day [election day] changed the way we work' (EOC, 1998, p4). Changes to the equality agenda were perceived to offer scope to progress equality (see Chapter 1).

2.3.2 Gender mainstreaming: An opportunity to progress the gender equality agenda?

The emergence of gender mainstreaming onto the EU's agenda in the mid-1990s represented a potential shift in the approach towards gender equality. Gender mainstreaming responds to some of the shortcomings of previous equal opportunities approaches and attempts to move beyond the limiting debate of whether women are, or should be, the same as, or different to men. The EU describes gender mainstreaming as an approach to mobilise:

'...all general policies and measures specifically for the purpose of achieving equality by actively and openly taking into account at the planning stage their possible effects on the respective situations of men and women (gender perspective). This means systematically examining measures and policies and taking into account such possible effects when defining and implementing them: thus development policies, the organisation of work, choices relating to transport or the fixing of school hours etc., may have significant differential impacts on the situation of women and men which must, therefore be duly taken into consideration in order to further promote equality between women and men' (EC, 1996).

In this way, the aspiration of gender equality is clearly stated. The approach requires a gender dimension to be considered in all policies and processes, at all levels. Indeed, Rees (1998) has argued that gender mainstreaming has the scope to transform policy and to move beyond the narrow definitions prescribed by equal opportunities. Squires (2005, p370) suggests that mainstreaming is a transformative approach that is capable of taking

'us beyond the classic opposition between equality of opportunity and equality of outcome, as embodied in equal treatment and positive action, by focusing on the structural reproduction of gender inequality and aiming to transform the policy process such that gender bias is eliminated'.

Mainstreaming was formally launched in the UK in 1998 but with no genuine commitment, infrastructure or resources (Rubery and Rake, 2000). There have been some advances, mostly within public sector organisations. The Gender Equality Duty (GED) was introduced in April 2007, and requires all public authorities to demonstrate a commitment to promoting equality for women and men, and eliminating sex discrimination (EOC and End Violence Against Women, 2007). The GED also includes

specific duties for public bodies (in England) such as publishing a Gender Equality Scheme, with clearly stated gender equality objectives, carrying out gender impact assessments, and monitoring and reviewing the effectiveness of the scheme. It is too early to assess the impact of the GED, but the EOC have raised concerns that it may be viewed as a tick-box exercise without a commitment to genuine change. This is in addition to criticisms levelled towards gender mainstreaming more generally.

The ability of gender mainstreaming to transform or progress gender equality in practice thus far has been limited. Gender mainstreaming is obstructed by a lack of substantive practical application (e.g. Nott, 1999), and limited guidance available for governments on implementation (Mazey, 2000). Mainstreaming aspires to cross all policy fields, but in practice, the agenda seems to reflect a more 'integrationist' approach which involves gender being inserted into existing frameworks (Lombardo, 2005). This risks dilution by other policy priorities, for example in that different equality strand lobbies may have to compete for resources. Gender mainstreaming has not been applied in a way which can adequately address inequalities and continues to be critically debated in the feminist literature (Walby, 2005). Like previous gender equality approaches, gender mainstreaming remains a 'women's issue' perceived to be about equality for women rather than a strategy to consider the relational aspects of gender for men and women.

The trajectory of equality in the EU thus far reflects the theoretical feminist discourse of gender equality. Gender mainstreaming attempts to progress gender equality by overcoming the entrenched binary dualism of the positions of 'sameness' and 'difference'. Currently a 'dual approach' based on gender mainstreaming and specific measures is outlined as the most effective way to pursue gender equality objectives (EU, 2006). Although gender mainstreaming is firmly established on the EU's agenda, it has not been able to fundamentally transform the way that gender is approached within the EU. This is despite aspirations that it would challenge the 'unequal power relationship'

between women and men (Council of Europe, 1998). Whilst the trajectory of gender equality is critical in understanding the influences on the UK's diversity agenda, another crucial component has been the impact of an expanding equality agenda.

2.3.3 An expanding equality agenda

Article 13 of the Treaty of Amsterdam (1997) expands the scope of equality in the EU to pursue anti-discrimination policy in other areas. It presents the strands of sex, race and ethnicity, disability, sexual orientation, religion and belief and age as areas in which the EU should aim to eliminate inequalities.

'Without prejudice to the other provisions of this Treaty and within the limits of the powers conferred by it upon the Community, the Council, acting unanimously on a proposal from the Commission and after consulting the European Parliament, may take appropriate action to combat discrimination based on sex, racial or ethnic origin, religion or belief, disability, age or sexual orientation' (EU, 1997).

Up until this point, anti-discrimination legislation existed only in the areas of sex and race. The main new Directives resulting from the incorporation of a broader equality remit require Member States to 'take appropriate action' as envisaged by the new Article 13. The Race Equality Directive (2000/43/EC) has been described as 'one of the most significant pieces of social legislation recently adopted by the European Union' (Bell, 2002, p384). The Framework Directive (2000/78/EC) combats discrimination on grounds of religion or belief, disability, age or sexual orientation. These new Directives have added new concepts and applications of discrimination (Waddington and Bell, 2001) and broadened the way in which equality is to be conceptualised and implemented across all dimensions of equality. It reflects an understanding of the theoretical diversity agenda, by recognising multiple strands of identity. This represents a significant development in the way that equality is understood and offers potential to progress gender equality (and other areas of equality).

Whilst the Directives have been welcomed for recognising and legislating in new areas where inequalities exist – such as religion and belief, sexual orientation and age – there has also been scepticism about their potential impact. Waddington and Bell (2001) suggest that a hierarchy of equality has been created where race equality is currently prioritised, politically driven by a growing awareness of racism, electoral successes of right-wing nationalist political parties and concerns over migration. Additionally, definitions are at times ambiguous and confusing (Guild, 2000). A more specific concern for gender equality is that consistent definitions for different areas of inequality have been adopted because this approach was perceived to be most practical (McCrudden, 2005). This implies that inequalities are similar. But the ‘one size fits all’ approach has been criticised for its implicit assumptions that inequalities are equivalent, overlooking that different inequalities have different characteristics, and are perpetuated and experienced differently, often requiring different solutions (Verloo, 2006). The central policy preoccupations of different groups are different. For example, whilst tackling homophobia and lobbying for civil partnerships for same-sex couples have been crucial areas to progress equality based on sexual orientation, the relationship between paid and unpaid work and addressing the pay gap are critical for gender equality. Another vital question is whether the new framework is in fact adequate for recognising and addressing multiple inequalities – something that is central to the concept of diversity (EU, 2004; Fredman, 2005).

The EU seems undecided about the extent to which gender equality should be integrated and where it is more effective to separate gender from other equality areas. Historically gender inequality has been tackled under a separate stream because it has been covered by separate EU legislation. But with strands of equality being merged together, questions are raised as to whether by bundling equality together progress towards gender equality may be diluted.

The post-Amsterdam EU Directives have necessitated new legislation in the UK to combat discrimination on grounds of sexual orientation, religion and belief, and age, which has added impetus to the value of a single equalities body. In October 2007, the EHRC⁹ merged the Equal Opportunities Commission (EOC), the Disability Rights Commission (DRC) and the Commission for Racial Equality (CRE). The EHRC is also responsible for protecting human rights. The EHRC links equality and diversity together institutionally (Cabinet Office, DTI et al., 2001; DTI, ODPM et al., 2002). Bundling the equality strands within one institution represents a shift towards diversity, recognition of a broadening equality agenda and scope to understand more complex issues such as intersecting inequalities. The EHRC was formally established under the 2006 Equality Act after consultation with a wide range of stakeholders through consultation papers, *Towards Equality and Diversity* (Cabinet Office, DTI et al., 2001) and *Equality and Diversity: Making it Happen* (DTI, ODPM et al., 2002). This new institutional arrangement for the pursuit of equality poses significant questions about whether gender equality might not be diluted in some way within a single equality body. Other concerns have been raised, such as how the EHRC will represent all equality strands given its limited powers (O'Cinneide, 2007). And how the EHRC will be able to reconcile the concept of diversity (implying a focus on the individual) with the human rights framework and a statutory duty to promote good relations between and within groups (Equality Act, 2006, section 10) also remains to be seen.

Although the EHRC is still in its early operational phase, it seemingly lacks clarity. For example, the conceptualisation of equality and diversity is unclear. In a Standing Committee debate in the House of Commons on the Equality Bill on 29 November 2005, Meg Munn (MP and then Minister for Women and Equality) outlined what the Government meant by equality and diversity in the context of the EHRC:

⁹ The EHRC's remit is England, Scotland and Wales. A separate Equality Commission for Northern Ireland was established under the Northern Ireland Act (1998).

'We have a more sophisticated understanding of concepts such as equality and diversity today. By equality, we mean equal treatment or opportunity for two people who can be compared on grounds of, say, race or gender. Diversity, on the other hand, borrows from human rights principles. It recognises the sometimes unique needs of individuals and when fair opportunity or treatment cannot be determined through comparison with another individual' (HC, 2005, column 48).

'Of particular note are the definitions of diversity and equality. Diversity means recognising that each individual is different and that specific action may be required to achieve equality. Equality, on the other hand, means recognising that groups of individuals may experience different treatment when compared with other individuals because of particular attributes that they have and that this comparison may define the action necessary to achieve equality' (HC, 2005, column 49).

These definitions signal the friction in thinking about the position of individuals and groups which underlies the establishment of the single equalities body, which the EHRC needs to resolve early in its operational life. On the one hand, a human rights framework provides universal principles that allow the EHRC to respond to complex individual and group identities (Ben-Galim, Campbell et al., 2007). But on the other hand, the EHRC does not have legal powers to help individuals who have been discriminated on grounds other than legally recognised groups.

A further assumption is that institutionally, action on behalf of individuals (of each group) who are potentially subject to discrimination will not detract from action on behalf of others. However, different areas of equality require different mechanisms for progress (Verloo, 2006). Issues such as closing the gender pay gap require different measures compared to reducing instances of ageism. The EHRC may also need to arbitrate between different equality strands, given that the nature of how different strands will be represented within the EHRC has been a critical issue in the lead up to its establishment (O'Cinneide, 2007).

The EHRC's current articulated vision is: 'A society built on fairness and respect. People confident in all aspects of their diversity' (EHRC, 2007). This stated vision raises further questions about whether equality is defined as 'fairness and respect'? And what it means

to be 'confident in all aspects of diversity'? The Equalities Review and Discrimination Law Review (DLR)¹⁰ have attempted to answer some of these difficult and complex questions.

The Equalities Review was an independent enquiry led by Trevor Phillips, (the outgoing Chair of the CRE, who is also the first Chair of the EHRC), established to explore the underlying causes of discrimination (Equalities Review, 2005). Interpreting equality through a 'capabilities' approach, the Equalities Review has attempted to define an equality that leads to a fulfilling life, acknowledging broader societal constraints that are sensitive to both equality of opportunity and outcome (Equalities Review, 2007). This certainly offers scope to the equalities discourse as a 'capabilities' approach (see Sen, 1983; 1992; 1993; 1999) is an equality strategy that has a significant focus on promoting genuine choice and recognises structural societal inequalities.

The 'capabilities' approach, based on the work of Sen (1983; 1992; 1993; 1999) and developed further by Nussbaum (2003; 1999) (amongst others) has been used to evolve definitions and understandings of equality and justice. Sen develops a 'capabilities' approach to represent what a person is able to do or to be; to have the freedom to pursue well-being where capability is defined as 'a set of vectors of functionings, reflecting the person's freedom to lead one type of life or another' (Sen, 1992, p40). Nussbaum (2003, p37) adds that the language of capabilities 'gives important precision and supplementation to the language of rights'. For example, if people are going to exercise their political rights, they require the capability to do so; that – particularly in relation to gender – a capabilities approach is advantageous in that its starting point is 'what people are actually able to do and to be', therefore recognising some of the broader inequalities that exist in a particular society. It is the constraints of establishing and maintaining this 'capability set' where inequalities need to be explored in further

¹⁰ The DLR and the Equalities Review were announced by the Cabinet Office and DTI in 2005. They have since transferred to the Department for Communities and Local Government (DCLG).

detail. Nussbaum (2003, p41-42) believes that the set of capabilities that are most important need to be articulated so that they can be protected. She outlines ten open-ended central human capabilities. As well as including aspects such as being able to live life in good health and being protected from sexual violence, she also includes criteria such as 'being able to use the senses, to imagine, think, and reason', being able to experience emotions, 'being able to laugh, to play, to enjoy recreational activities', and political and material control over one's environment.

In a paper aimed to help inform the remit of the EHRC,¹¹ Burchardt (2006, p23) suggests that a capabilities approach may be advantageous as it provides a multi-dimensional approach reflecting 'the plurality of objectives which people have in their lives'. It also provides opportunities as a measurement tool to detect and measure changes over time. Public consultation could also be promoted as a strategy to develop a normative 'capabilities set' which could enhance transparency (see also Robeyns, 2003). Through these strategies, Burchardt proposes ways in which a capabilities approach could be potentially interpreted and applied by the EHRC. A capabilities approach interpreted in this way, could begin to offer 'genuine choices' – an essential criteria of gender equality (outlined in Chapter 1). Considering Robeyns' (2007, p65) principles for a gender just society could further enhance progress to gender equality. Again based on an understanding of capabilities, Robeyns develops principles for a gender just society, which are: the establishment of the same capability sets for men and women, that constraints on choices should not be based on social constructed characteristics such as gender, and that the 'pay-offs' of different options, such as job satisfaction or monetary value derived should not be biased by gender. These examples highlight principles that could be applied in practice.

¹¹ The Equalities Review commissioned a number of reports on equality and diversity to inform the EHRC's work. A list can be found at: <http://archive.cabinetoffice.gov.uk/equalitiesreview/publications.html> (accessed January 2008)

Trevor Phillips (2007) as the incoming chair of the EHRC is attempting to establish and capitalise on an enriched definition of human rights based on a 'capabilities' approach that creates space for dialogue and negotiation to take equality beyond comparators, discrimination and difference, so that each individual can fulfil their potential. This may provide a practical opportunity to devise and implement policies that attempt to pursue equality based on a 'capabilities' approach. This offers possibilities for gender equality. But there is a profound tension between the EHRC's legal powers and the way that the Equalities Review has defined equality (Ben-Galim, Campbell et al., 2007). Legislation is still largely based on equal treatment. And concerns about how different individuals' current experiences (and in the future capabilities) are accommodated and / or reconciled in application are not yet resolved. And as yet there are no practical policy examples that incorporate a capabilities approach.

The Equalities Review also highlighted that working mothers, some ethnic minority groups and disabled people were experiencing high levels of discrimination (Equalities Review, 2007). Becoming a mother was revealed as the 'one factor that above all leads to women's inequality in the labour market' (Equalities Review, 2007, p66-7). Family tax credits and work-life balance policies are presented as ways to mitigate this particular inequality (this is discussed in Chapter 4). Although the recognition of mothers in the labour market facing high levels of disadvantage should be welcomed as a policy priority, suggested proposals such as extending guidance to workplaces in the private sector on flexible working seem weak. Evidence presented in the Equalities Review suggests that the EHRC will need to consider policies that help mothers and fathers to care whilst fulfilling employment obligations. In policy terms this may mean policies supporting a range of choices about how people organise their time (Lewis and Giullari, 2005), offering more 'genuine choice' to both men and women, and addressing structural gender inequalities.

Definitions and interpretations of equality and diversity as well as the relationship between them, are not the only points of tension that require clarification. Although the Equality Act (2006) established the EHRC, it did not attempt to codify, simplify or harmonise the anti-discrimination legislation – that has been largely the role of the Discrimination Law Review (DLR) (O'Cinneide, 2007). Harmonisation represents a major challenge for the Government as there are 117 equality measures in force: 36 acts, 50 statutory instruments, 14 codes and 17 EC Directives (Hepple, 2006). The publication of the Government's Green Paper, *A Framework for Fairness: Proposals for a Single Equality Bill for Great Britain* (DCLG, 2007) was delayed reportedly due to disputes over the strength of its proposals (Branigan and Carvel, 2007). Since it was published, concerns have been raised by stakeholder groups. For example, the EOC was disappointed that it did not include proposals to modernise equal pay legislation and suggested that the consultation missed the opportunity to tackle intersecting inequalities, and to modernise protection for people with caring responsibilities (EOC, 2007d). Despite the Equalities Review highlighting the potential of a capabilities approach, that could begin to tackle some of these inequalities and could be beneficial for gender equality, these criticisms highlight a potentially missed opportunity. The ambition to establish a Single Equality Act was a manifesto commitment from Labour, and the publication of *A Framework for Fairness* was part of a wider effort to ensure that it is enacted.

It is difficult to predict the implications for gender equality as a result of the establishment of the EHRC, as well as the influence of the DLR and Equality Review. In a paper for the EOC, Fredman argued that the merging of equality strands into a single equality body would be advantageous for gender equality because it has the potential to address cumulative discrimination more effectively and resolve competing tensions between equality strands as they arise (Fredman and EOC, 2002). Indeed, the EOC initially supported the establishment of the EHRC for the ability that it would have to consider multiple and interacting inequalities that cut across equality strands (O'Cinneide, 2007).

As yet, the remit of the EHRC or accompanying legislation does not enable it to address these complexities. Legislation is still largely based on equal treatment and is subject to criticisms identified earlier in this chapter.

The precarious status of gender in relation to other types of inequalities was highlighted by the EOC's intention to draw up a 'gender manifesto' for the next ten years to influence the agenda of the EHRC to ensure that it is informed by 'a strong gender legacy' (EOC, 2006a, p2). The DLR consultation as well as the Equalities Review have provided opportunities to lobby for change. The Fawcett Society¹², aiming to capitalise on this potential, published a paper outlining proposals that included: simplification of gender equality legislation through harmonising existing sex equality legislation under a Single Equality Act; ensuring that legislation is enforced more effectively; introducing a new protected ground for discrimination in the proposed Single Equality Act of family and caring status; and addressing the current imbalances of the legal system that places much of the onus on the individual for seeking redress (Bellamy and Cameron, 2006). It is still too early to know whether these proposals will generate fundamental change. These proposals are examples of how an extended equality remit could be advantageous for the pursuit of gender equality.

By merging equality institutions, the EHRC reflects an understanding of diversity that has widened the equality agenda and has the potential to consider multiple and interacting inequalities that cut across equality strands to progress equality. However, significant areas of tension in conceptualising and applying definitions of equality and diversity, as well as disentangling how the EHRC will address group and individual discrimination, have also arisen. This raises concerns that sex and gender will get lost in the diversity bundle, that a hierarchy of diversity strands may emerge, and that the importance of

¹² The Fawcett Society is an organisation that 'campaigns for equality between women and men in the UK on pay, pensions, poverty, justice and politics' (Fawcett Society, 2008).

group inequalities will be diminished which are crucial in understanding systemic gender (and other) inequalities (Ben-Galim, Campbell et al., 2007).

2.4 Diversity: An employment focus is key

The diversity narrative in the UK is further informed by an emphasis on employment. The European Employment Strategy (EES) as well as how diversity has been influenced by the human resources discourse are the areas highlighted in this section. Linking diversity to paid work risks overlooking the relationship between paid and unpaid work which underpins gender inequalities.

The EES has a sharp focus on increasing labour market participation rates. In the 1990s, the EU expanded its social policy remit, through the Maastricht Treaty (1993) and the Treaty of Amsterdam (1997). The expansion is set within a context of economic pressures, such as those stemming from globalisation, that have constrained the EU in applying a broad range of social policies. As part of the EES, key employment targets for the EU have been established that include: an overall employment rate of 70 per cent by 2010; a female employment rate of 60 per cent by 2010; an employment rate for workers aged 55-64 of 50 per cent by 2010 (EU, 2005). Through these employment targets and targets to increase childcare provision,¹³ the EES has been successful in increasing the visibility of the EU's commitment to gender equality. In order to increase the labour market participation rate for women, a range of efforts such as closing the gender pay gap, promoting employment to women in all areas of the labour market and reducing instances of sex discrimination have been identified as necessary (EU, 2006).

But with the focus narrowed on labour market participation rates, arguably substantive gender equality issues have been demoted (Rubery, Grimshaw et al., 2003). The emphasis is on policies that support women's employment (such as childcare provision)

¹³ Childcare targets set at the Barcelona summit (2002) aim to provide childcare to at least 90 per cent of children aged between 3 and mandatory school age and at least 33 per cent of children aged under 3 by 2010.

rather than policies that increase entitlements to leave. Work / family reconciliation policies – which are considered important levers necessary to achieving EES targets – have prioritised facilitating women's employment, rather than increasing entitlements to leave or focusing on men and women sharing caring responsibilities (Lewis, 2006).

The emphasis on policies that focus on supporting women's employment is entrenched in the EU's approach. It echoes the US influences of 'managing diversity' within the EU's framework (discussed below). The extent to which these policies support gender equality vary in different member states and as a result provide different opportunities and constraints for women and men (e.g. Hobson, 2004; OECD, 2007).

2.4.1 The '*managing diversity*' discourse

The conceptualisation of diversity in the UK draws heavily on socio-political changes in the US during the 1980s and 1990s. The interpretation of diversity in the UK has been influenced by US conceptions of 'managing diversity', focused on harnessing the potential of each individual employee. This discourse is linked to the factors outlined above; of an expanding equality agenda, an evolving equal opportunities discourse in implementation, and a focus on employment.

The concept of diversity in the US emerged primarily in response to concerns that women and ethnic minorities would constitute a greater number of new entrants in the workforce than 'White' men. Thomas (1991) argued that three interacting trends elevated the need for diversity; the global market was becoming intensely competitive, the make-up of the US workforce had changed, and individuals wanted to celebrate their different identities rather than assimilate into mainstream culture. Additionally, the Reagan administration reduced its commitment to formal equality measures. In contrast to affirmative action programmes, diversity offered an approach that recognised differences

at the individual level without being contentious (Agocs and Burr, 1996) and was perceived to be politically palatable:

'It was hard to find anyone who liked affirmative action or who was for quotas. On the other hand, it was equally hard to find anyone who was against diversity and inclusion' (Thomas, 1999, p59).

Whilst the definition of diversity at the level of the firm is contested, common dimensions prevail such as recognising the potential contribution of each employee, focusing on the individual, extending the remit of equality to cover all areas protected in the legislation (at a minimum), devolution of responsibility to line managers, and the visible link between diversity and productivity. These dimensions link diversity to equality, explicitly by recognising an extended equality agenda. Diversity policies are also perceived to be strategies to recognise the potential of each individual employee. Questions arise about whether diversity actually represents a different approach to equality or whether it simply repackages equal opportunities policies under a more positive heading (e.g. Cornelius, Gooch et al., 2001; Hoque and Noon, 2004).

Diversity in organisations is differentiated from previous equality approaches (summarised in Table 2.1). Whereas equal opportunities approaches have often been perceived as legislative, defensive and at times punitive, diversity is considered to be positive – valuing and celebrating differences with no formal enforcement legislation. It is clear that diversity and equal opportunities are not the same, but there is often confusion about their differences. In the literature, opinions are divided on whether diversity extends the remit of equal opportunities or whether it offers a new paradigm. The Institute of Personnel and Development¹⁴ (IPD, 1996) categorised diversity as an 'evolutionary step' for equal opportunities, and Liff (1999) adds that it is an essential building block that is able to take on the achievements of equal opportunities policies. In this way, diversity is viewed as a progression from equal opportunities and positive

¹⁴ The Institute of Personnel and Development (IPD) became the Chartered Institute of Personnel and Development (CIPD) in 2000 upon receiving chartered status.

action (Thomas, 1991). An alternative view is that diversity is simply equal opportunities repackaged into a language suitable for business that employers (who are the customers) are willing to buy (Overell, 1996). Both of these are apparent in application, where many employers have transferred equal opportunities policies to be under a diversity banner, barely altering them (Hoque and Noon, 2004), but also suggesting that diversity has extended the equal opportunities agenda.

Diversity is also perceived to be more cost-effective in comparison to equal opportunities, and less contentious because it does not promote specific groups in the labour market (Liff, 1997). Different drivers for change are also discussed throughout the literature, which are evident through the case studies carried out for this research (Chapters 5 and 6). External factors such as legislation drive an equal opportunities agenda, whereas the impetus for diversity is more about internal changes for an employer to gain benefits from a diverse workforce – i.e. the business case (Maxwell, Blair et al., 2001). These differing rationales also lead to different methods of application, through legislation or via voluntary self-regulation mechanisms (Noon and Ogbonna, 2001b). Furthermore, equal opportunities policies are often perceived as a liability, compared to a diversity framework which is often considered an asset (Wilson and Iles, 1999).

Table 2.1: Summary table of differences between equal opportunities and ‘managing diversity’ (compiled from the literature)

<i>Equal opportunities</i>	<i>‘Managing diversity’</i>
- Based on liberal arguments associated with social justice - Protected by a legislative framework – externally driven - Responsive to legislation - Primarily focused on collective disadvantage - Often based on targets and statistics – e.g. recruitment targets - Main focus has tended to be sex and race - Largely based on equality through sameness. Sometimes also positive action to redress past discrimination	- Strongly underpinned by the business case - Voluntary for companies and self-regulated – internally driven - Proactive - Primarily focused on the individual - Based on maximising the potential of the employee - Attempts to respond to the expanding legislative agenda as well as broader dimensions of identity - Attempts to move beyond same-difference dichotomy in relation to gender

Although inherited from the US discourse, there are some significant differences in emphasis and application in the UK, reflecting a different political and cultural landscape. Diversity in the US arose in response to affirmative action programmes and to threats to the labour market position of the 'White' man. The strength of affirmative action programmes in the UK has never been as strong as in the US, and the demographic threats posed by non-white workers have not been associated with the same cultural and political undertones in the UK. In addition, the legislative context differs. EU Directives require member states to implement a minimum standard of provision in relation to anti-discrimination legislation (for a variety of groups) as well as employee rights – such as maternity, paternity and parental leave. Different discrimination laws exist and in the absence of any comparable work-life balance legislation to that in the UK, US companies are essentially responsible for providing employee benefits. Gonyea and Googins (1996) suggest that concerns related to job security, income security and the increased stress people experience in balancing their work and family responsibilities extend the scope of responsive policies that companies should provide. This takes on different significance in the US where social provision, and work-life balance policies are less extensive.

Whilst in both discourses diversity is associated with the individual, there are differences. In the US, the benefits to be derived from a diverse team are presented as advantageous. For example it is argued that women, as women, may bring a combination of skills, attitudes and personal characteristics to a team (Mason, 2002). This conceptualisation is based on understandings of gender difference (perhaps modifying understandings associated with affirmative action to be more accessible), and potentially limits the possible progress in relation to gender equality. Whereas in the UK the individual is presented as gender-neutral. Contributions of each individual are positively embraced and recognised (Kirton and Greene, 2005). Harnessing the potential of each individual employee is a clear priority of diversity in organisations, and distinguishes diversity from an equal opportunities approach. These differences

alongside legislation and policy shape the application of diversity policies in UK organisations.

The concept of diversity is substantively linked to employment by the emphasis to harness each individual's contribution to fulfil organisational goals. This aspect of diversity – widely resonates in how the UK Government encourages organisations to conceptualise and implement diversity (and work-life balance policies). In the mid-1990s, Kandola and Fullerton (1994, p8) defined diversity in terms of 'managing diversity', setting the parameters for implementation in the UK:

'The basic concept of managing diversity accepts that the workforce consists of a diverse population of people. The diversity consists of visible and non-visible differences which will include factors such as sex, age, background, race, disability, personality and workstyle. It is founded on the premise that harnessing these differences will create a productive environment in which everybody feels valued, where their talents are being fully utilised and in which organisational goals are met'.

The focus on the individual has been strongly critiqued on the basis that there is no room for identifying collective disadvantage and structural inequalities, and that the business case for equality is preferred to the moral case for equality (Mason, 2002). The business case underpins diversity. Simply put, the business case rests on arguments that respond to changing demographic and employment patterns, and in particular the rise in women's employment rates (Employers for work-life balance, 2004; Hogarth, Hasluck et al., 2001). In a Work Foundation report, the advantages associated with an effective diversity approach are reported to include: improved performance, improved ability to be innovative, reflecting customer base, higher staff motivation, higher staff retention and improved employer image (Jones, 2006). Other reported benefits associated with a diversity approach include decreased conflict and stress, enhanced productivity, improved team work, morale and job satisfaction (Agocs and Burr, 1996). Additionally, diversity may encourage employees to confront their own stereotypes about people who are 'different' from them (Agocs and Burr, 1996). With its reliance on the business case, diversity is able to take advantage of labour market conditions and maximise employee

potential, allowing for enhanced creativity (Cornelius, Gooch et al., 2001). The strength of the business case does make diversity policies reliant on a strong and competitive economy and links its success closely to a thriving economy (Strachan, Burgess et al., 2004), suggesting that diversity strategies may be vulnerable to economic downturns (Barnes and Ashtiany, 2003).

Arguably the business case moves the rationale for equality from social justice foundations to that of the economy and business (Noon and Ogbonna, 2001a). The question has changed: 'instead of asking what can be done to relieve the employment disadvantage disproportionately experienced by some social groups, the question centres on how workforce diversity can contribute to organizational aims and objectives' (Kirton and Greene, 2005, p202). In doing so, Kirton and Greene (2005) suggest that diversity policies differ from equality approaches in four main ways: (1) diversity views differences based on identity more positively; (2) diversity downplays collective group membership; (3) diversity prioritises a business case rather than a case for social justice; and (4) diversity encourages a transformation in organisational culture.

2.5 Diversity and organisational culture: A genuine opportunity?

Sex equality policies have been operational in UK workplaces since the late 1970s. They have traditionally reflected the (minimum) legislative requirements of the Sex Discrimination Act (SDA) and Equal Pay Act (EqPA), with equal opportunities policies being the primary method of implementation. The legislation prohibits direct¹⁵ and indirect¹⁶ discrimination. Additional provision protects women against discrimination on grounds of pregnancy and maternity leave. There is also legal protection against

¹⁵ Direct discrimination 'is where a woman (or man) is treated less favourably than a person of the opposite sex in comparable circumstances is, or would be, because of her (or his) sex' (EOC, 2006c).

¹⁶ Indirect discrimination 'is where a provision, criterion or practice is applied (or would be applied) to both sexes but which puts one sex (or married persons) at a particular disadvantage and cannot be shown to be a proportionate means of meeting a legitimate aim. For example, a requirement to work full-time' (EOC, 2006c).

harassment¹⁷ and victimisation. Throughout the 1980s and 1990s, a variety of approaches and strategies were suggested to pursue equality goals, with a particular focus on implementation in organisations. Jewson and Mason (1986) outlined 'liberal' and 'radical' approaches, whereas Cockburn (1989) defined a 'long' and 'short' agenda, where much of the debate reflected concerns with equality of opportunity and outcome. These categorisations for the workplace are similar to the 'sameness-difference' debate in both theory and policy. Reflecting the theoretical position of 'sameness', the 'liberal' approach is focused on equality of opportunity, where the aim is to remove 'unfair distortions to the operation of the labour market by means of institutionalising fair procedures in every aspect of work and employment' (Jewson and Mason, 1986, p315). In contrast, the 'radical' approach draws on ideas of gender 'difference' and is concerned with outcomes, arguing the premise that ability (on which liberal approaches are based) is defined by socially constructed expectations. The radical approach 'seeks to intervene directly in workplace practices in order to achieve a fair distribution of rewards among employees, as measured by some criterion of moral value and worth' (Jewson and Mason, 1986, p315). Cockburn (1989) describes this as a positive starting point, but dichotomous and restrictive, therefore suggesting a 'long' and 'short' agenda. The short agenda is characterised by minimal and formal equal opportunities policies, whilst the long agenda is transformative, addressing power imbalances, structural barriers in organisations and at its 'longest' challenging inequalities in society as a whole.

The range of strategies highlights the complexity in defining equal opportunities in an organisational context. Common definitions include equal opportunities as policies and procedures that are targeted towards groups protected by legislation, with the focus on treating people fairly (Breitenbach, 2002; Cornelius, Gooch et al., 2001; Liff, 1997). Policies respond to the broader political environment (Forbes, 2002). Liff (1999, p66) describes equal opportunities policies within an organisational setting as policies that

¹⁷ Harassment is 'unwanted conduct on the grounds of the recipient's sex; or unwanted verbal, non-verbal or physical conduct of a sexual nature' (EOC, 2006c).

'attempt to eradicate consideration of social differences from organisational decision-making using bureaucratic means'. Thomas and Ely (1996) branded equal opportunities within the context of a 'discrimination and fairness paradigm' where the logic is based on notions of fairness, and treating all employees fairly, equally and in compliance with the legal framework. Recruitment and retention are the area of primary focus, with career development programmes and mentoring common. A problem identified with this approach is that progress is measured by how successfully recruitment and retention goals are met, which is a narrow indicator of success. This was one of the major critiques of *Opportunity 2000*, which throughout the 1990s aimed to increase the number of women in the UK workforce. The reality was that the emphasis on career progression and targets highlighted only a specific segment of the problem. Thus the campaign had little effect for women who were 'ghettoised' at the lower end of the job hierarchy with low pay and job insecurity (Noon and Ogbonna, 2001b; Richards, 2001). Other limitations identified with these overarching equality frameworks were that they treated employees as being the same, with the perception that a standard male employment pattern was the normative framework and that the approach was largely procedural, therefore not challenging attitudes (Liff, 1999). These limitations echo the theoretical shortcomings identified with an approach based on sameness.

Alternative approaches have been based on strategies of difference. Thomas and Ely (1996) call this the 'access and legitimacy paradigm' and it is based on celebrating differences that are associated with a diverse workforce. Benefits are derived from the workforce reflecting the customer base and capitalising on the talents and potential of each employee. But again the limitations reflect the feminist literature, in that women and men are categorised into groups and compared, and strategies such as affirmative action and positive discrimination are problematic.

The focus on the individual suggests that diversity strategies have not necessarily overcome the dilemma about whether employees should aspire to be the 'same' or 'different'. In fact, diversity policies may perpetuate an equality based on notions of difference. Given that every employee is different, valuing difference in diversity implies that employees may require different treatment (Barnes and Ashtiany, 2003). This poses a challenge to organisations, and in particular how to ensure that they are compliant with anti-discrimination law (mostly based on equal treatment) whilst promoting difference. In addition it questions whether certain 'equalities' should be prioritised over others and what are the potential implications. Barnes and Ashtiany (2003) suggest that the dissatisfaction of those who are not assisted by the diversity strategy may become a problem. This 'backlash' emerges as an issue in the case study organisations (discussed in Chapters 5 and 6) from employees who are not parents (see also Burke, 2005).

Many organisations combine equality approaches, with diversity now being added to the mix (Noon and Ogbonna, 2001b). In some organisations, diversity is simply equal opportunities re-labelled (Cornelius, Gooch et al., 2001, p33), thus substantiating the 'empty-shell hypothesis', in that names have changed, but policies have not (Hoque and Noon, 2004). However, this seems too simplistic and the mix is more complex between these approaches, as the case studies illustrate (in Chapter 5).

2.5.1 Gender and work: Challenging organisational culture?

The gendered nature of the organisation may provide or obstruct opportunities to develop gender equality in the organisational context. There exists a vast literature on gender and work that includes contributions from a wide range of disciplines such as sociology (e.g. Acker, 1990; Kanter, 1977), management studies (e.g. Burke and Nelson, 2002; Davidson and Burke, 2000) and psychology (e.g. Ely, Scully et al., 2003). Whilst issues such as gender identity and management styles are important, it is the gendered nature of organisations that is of particular relevance to this research. It is a relatively

new field. In the 1990s a body of evidence that linked organisational life with gender emerged (Edwards and Wajcman, 2005). Until then, there was perhaps an underlying assumption that organisations were gender neutral.

Acker (1990) argues that organisational practices contribute to creating gender divisions such as those between paid and unpaid work and occupational segregation, and therefore a systemic gender analysis of organisations is required. These gendered processes include implicit and explicit dimensions where gender stereotypes and images may be invented, reproduced and disseminated (Acker, 1990). Building on Acker's work, Meyerson and Kolb (2000) outline that gendered processes within organisational culture include formal practices and procedures; informal work practices; organisational symbols and images; social interaction and expression of gender identities. In later work, Acker (2006, p444) proposes the concept of inequality regimes 'defined as loosely interrelated practices, processes, actions, and meanings that result in and maintain class, gender, and racial inequalities within particular organizations'. The added awareness of the intersection of class, race and gender in an organisational context provides a specific location where the potential of cross-cutting inequalities – central to the development of diversity in gender theory – can be effectively explored and analysed.

Levels of organisational inequality will vary by factors such as how resources are distributed, decision making processes and how pay and benefits are negotiated (Acker, 2006). Implicit and explicit gendered processes are important here, impacting on how jobs are defined as well as people's gendered understandings of the organisation and work culture (e.g. Wajcman, 2000). This gendered organisational culture manifests itself in different ways (examples of which emerge in Chapter 6). For example, wider disparities in men's and women's caring roles potentially maintain a gendered organisational hierarchy, where men may be in jobs that are perceived to require more time and commitment, often with more status and often with a higher salary.

This gendered organisational culture also creates and perpetuates the idea of an 'ideal worker'. Although the concept of an 'ideal worker' is gender neutral, in practice it is gendered. Wajcman (1998, p132) argues that in management this construct is maintained by the sexual contract where wives support male workers to be 'freed' from domestic duties to concentrate on their careers. Whilst the increase of dual earner households has certainly eroded the extent to which that is true, perceptions of the 'ideal worker' – one who works full time and is often male – still exists.

'This worker is actually a man; men's bodies, sexuality, and relationships to procreation and paid work are subsumed in the image of the worker. Images of men's bodies and masculinity pervade organizational processes, marginalizing women and contributing to the maintenance of gender segregation in organizations. The positing of gender-neutral and disembodied organizational structures and work relations is part of the larger strategy of control in industrial capitalist societies ...' (Acker, 1990, p39)

The relationship between gender and work and associated organisational policies can contribute to challenging this ideal, as will wider legislative and societal changes. Liff and Wajcman (1996, p90) argue that in prioritising full-time work, part-time work is considered inferior, and the ideal worker needs to be recalibrated with greater gender awareness. Perhaps this requires a similar recasting that Fraser (1994; 1997) offers in her vision of transforming a universal breadwinner to universal caregiver (Chapter 7).

Categories of equality frameworks have been devised, providing useful guidance in understanding the aims, development and methods of implementation in organisational settings more generally. In each of these equality spectrums a turning point is evident – where policies and procedures alone are deemed to be insufficient to challenge inequalities – and a focus on organisational culture is considered fundamental to effect change (e.g. Cockburn, 1991; Jewson and Mason, 1986; Kolb, Fletcher et al., 2003; Meyerson and Kolb, 2000; Thomas and Ely, 1996).

In the mid 1990s, Jewson, Mason et al. (1995) outlined five strategies for pursuing an equalities framework; serendipity, dissociation, accommodation, integration and assimilation. Placed on a spectrum of commitment to equal opportunities, serendipity is 'characterised by a failure to develop self-conscious and dedicated equal opportunities practices. Not only is there no formal equal opportunities policy but little or no attempt is made to develop specific programmes aimed at advancing the employment interests of members in disadvantaged groups' (Jewson, Mason et al., 1995, p2). The policies that do exist are ad-hoc, directly responding to business needs. Dissociation is described as organisations having formal equality commitments and policies, but they are seen as token. Accommodation is indicative of a genuine commitment to equal opportunities, but a lack of strategic direction. Integration is identified as a turning point in this model whereby 'there is a fully integrated articulation between equal opportunities and business practice' (Jewson, Mason et al., 1995, p3). It is at this point where strategic vision combines with a comprehensive framework to identify a long-term agenda for the organisation as well as identifying critical barriers (e.g. Cockburn, 1989). Finally, assimilation moves beyond integration in that 'a formal policy commitment to equal opportunities objectives is retained but all aspects of practice and implementation are assimilated into business strategies and routines' (Jewson, Mason et al., 1995, p3). Specialised equality units would disappear and provision for specific groups would no longer be required. It would reflect a move towards diversity, that has challenged the structural barriers inherent in the organisation and that empowers employees. This continuum provides criteria which are helpful to classify and understand progress towards equality. Until the point of integration, substantive progress towards equality is not expected to be achieved.

Suggested 'managing diversity' approaches for organisations have also been developed. Similar to Jewson, Mason et al's (1995) spectrum, a turning point which recognises that organisational culture must be challenged is evident. Although Thomas and Ely's (1996)

model was developed in the US, it is relevant to the UK context. The model positions an emerging diversity paradigm as responding to shortcomings of models that pursue equality through 'sameness' and 'difference' strategies. The necessary pre-conditions for this diversity model assume a changing organisational culture.

'The new model for managing diversity transcends both ... it acknowledges cultural differences among people and recognizes the value in those differences. Yet this new model for managing diversity lets the organization internalize differences among employees so that it learns and grows because of them' (Thomas and Ely, 1996, p86).

In applying similar criteria specifically to gender equality, Meyerson and Kolb (2000) (see also Kolb, Fletcher et al., 2003) provide feminist approaches to organisational change.

They suggest that policies have traditionally fallen into the limited categories of:

- Equip the woman / liberal individualism – where women lack valuable skills to succeed in the workplace and strategies have included equal opportunities, leadership development and assertiveness training;
- Create equal opportunities / liberal structuralism where structural barriers between women and men are perceived to be the limitation and affirmative action programmes and revising recruitment procedures have been common; and
- Value / celebrate difference or women's standpoint / advantage where constructions of masculine and feminine identity are valued and diversity policies that recognise and celebrate everyone's differences are common.

Again strategies of sameness and difference are located, often in tension – where goals to minimise 'differences between women and men so that women can compete as equals' (Kolb, Fletcher et al., 2003, pp10-11) are situated in contrast to embracing differences between 'men' and 'women'. Given the critiques associated with these approaches – such as adherence to a male normative standard (to be the same as or different from), and an assumption that all men and all women are similar – Kolb, Fletcher et al. (2003) suggest an alternative approach entitled 'revise work culture'. It rests on the assumption that workplaces are gendered:

‘Gender in this frame is not so much a biological concept as it is a social construct – an organising principle that underlies organizational life. In other words, gender in this frame is not about women or discrimination, but is about the organization itself’ (Kolb, Fletcher et al., 2003, pp13-14)

Whilst these examples extend beyond just equality strategies, they stress the importance of recognising broader organisational issues, highlighting that an organisational perspective is required if genuine equality aims are to be pursued.

The ‘managing diversity’ literature suggests numerous strategic plans, templates and tool-kits, often complemented by case study examples of ways to manage diversity effectively and efficiently (e.g. Allen, 2004; Kandola and Fullerton, 1994; Thomas, 1991). Many of these authors argue that for diversity policies to be successful, they need to be embedded in an organisation’s practice and business strategy, such as recruitment and selection, training and development, terms and conditions of employment, monitoring and auditing. The challenge is presented to organisations, suggesting that fundamental organisational change with a considered gender focus is required. These frameworks outline how organisations can be categorised and evaluated in accordance with their approach towards gender equality. They serve as guidance for the case studies examples.

Webb (1997, p163-4) suggests that the emergence of diversity in organisations reflects an altered political landscape that also reflects new-right ideology of neo-liberalism and individualism:

‘The wider political shift from collective models of industrial relations, state regulation of labour markets and associated bureaucratic control procedures to deregulation, free market competition and notions of “HRM” based on maximizing the contribution of the individual’.

Clearly this has implications for the individual. Diversity empowers the employer to be free from the constraints of sex, ethnicity or disability and select employees based on ‘talent’ (Webb, 1997). Some of the implications of a diversity approach are similar to

concerns raised by an expanding equality remit in the way that it focuses on the individual. Although diversity could address long-standing concerns about cross-cutting inequalities, it tends to be tied to the level of individual opportunity and experience. This is problematic for anti-discrimination and equal opportunities legislation, particularly in the UK, that seeks individual redress based on group categorisations. It is also problematic in that it forms the context in which work-life balance policies are conceptualised and implemented. There remains the issue of which discourse of diversity – that emanating from the race and ethnicity literature, from the human resources management literature or from feminist literature – as well as which definition of diversity will prove more influential with policy-makers.

2.6 Conclusion: The nature and scope of diversity

This chapter has presented some of the challenges associated with the emergence of diversity as an approach to pursue gender equality. It has outlined the theoretical potential offered by a diversity discourse – from the feminist theoretical literature – to progress gender equality. This approach to diversity provides opportunities to overcome the same-difference dichotomy that has limited progress towards gender equality, by recognising and addressing different aspects of (in)equality and how they may intersect. However, in beginning to understand the theoretical promise, diversity begins to unravel in application.

The influences that shape the specific nature of the diversity discourse in the UK – which include a strong link to employment and an expanding equalities remit – have created a specific type of diversity. ‘Managing diversity’ – in which the individual’s potential contribution is emphasised – has become prominent. Whilst there are positive aspects associated with this type of approach, there are also concerns. This understanding of diversity is problematic for the pursuit of gender equality, as gender disparities – such as labour market inequalities and gendered organisational culture – are often overlooked.

The interpretation of diversity in the UK opts for a palatable 'business case', moving the focus away from a social justice premise for equality towards an economic rationale. Despite the benefits offered by a diversity discourse, such as a dynamic and progressive approach towards employment, the reliance on an interpretation of diversity that emphasises the human resource implications is problematic for the pursuit of gender equality. Some diversity policies are equal opportunities relabelled, whilst others seem to subscribe to notions of equal opportunities based on difference. In emphasising difference, diversity may in fact be reinforcing gender stereotypes (Kirton, 2002), particularly when addressing caring requirements and responsibilities. There is also an assumption that diversity is something that can be 'managed' (Sinclair, 2000). Work-life balance policies are often located within a diversity approach, thereby raising questions as to how far they are able to progress gender equality.

3.0 RESEARCH METHODOLOGY

3.1 Introduction: Outlining the research methodology

This chapter outlines the research methodology including its advantages and the obstacles encountered. It presents the chosen methodology as a robust framework to analyse the gender dimensions of work-life balance policies and to address the research questions: firstly, to what extent are work-life balance policies framed by 'diversity'; secondly, how does this impact on the conceptualisation and implementation of work-life balance policies (in government and in organisations); and thirdly, what are the implications for gender equality?

To answer the research questions this thesis has three linked components, analysing theoretical concepts, government policy and organisational practice. The research core of the thesis involves documentary analysis of government policy, and three case studies to illustrate implementation. In addition, a literature review supports this research and provides the relevant framework for analysis. The literature review is divided into two main components: the first traces the development of diversity through the equalities framework (Chapter 2); and the second aims to understand the development of work-life balance policies in the UK context (Chapter 4). Qualitative research strategies were used to collect and analyse primary data. The decision to adopt these particular tools to answer the defined research questions is discussed. The chapter then proceeds to detail the research method, as well as issues that arose. It outlines the key stages: policy analysis of government documents, undertaking case studies, and analysis of data. The chapter further considers the scope of the findings based on the chosen methodology.

3.2 Literature review and analysing UK Government policy

In order to determine the specific nature of the research questions and establish the foundations for the primary research, a literature review and analysis of the UK Government's work-life balance agenda was undertaken. The literature review firstly

traces the development of diversity through the equalities framework (Chapter 2), drawing on the feminist literature on equality, as well as others such as the 'managing diversity', and gender, work and organisation literatures. Through the review it is suggested that work-life balance policies are located within the context of a diversity narrative that emphasises 'managing diversity', and that this has implications for the conceptualisation and implementation of work-life balance policies at the level of government policy and organisational practice. The literature review also highlights the tensions that emerge between the concepts of equality and diversity (in theory and application), and it is suggested that this may limit progress towards gender equality.

The other main component of the literature review analyses the development of work-life balance policies in the UK context (Chapter 4). It demonstrates that a narrative has developed – that encompasses flexible working, family-friendly policies and work-life balance – that attempts to extend the provision of work-life balance policies beyond parents to everyone. In addition, the literature review explores the terminology of work-life balance, and considers what needs to be 'balanced'. A thorough evaluation of the UK Government's work-life balance agenda is presented through analysing key government policy documents, such as legislation and consultation documents (Chapter 4). The Government's role in supporting families and facilitating work-life balance choices is critically examined. This analysis forms the foundations for the case studies, highlighting the key dimensions to explore through the primary research.

The exact nature and scope of the research questions were informed by the literature review. The process of framing the specific research questions was itself an evolution. After conducting preliminary literature searches, it became clear that diversity had become a common way to discuss equality and was a critical component in understanding and framing work-life balance policies in the UK. It was also clear that ambiguity and confusion surrounded the term, in both its conceptualisation and its

implementation. In order to understand the gender dimensions of work-life balance, it was necessary to examine the implications of a changing equality discourse. The dimensions examined in this research are based on qualitative research methodology, with the aim of providing a more detailed explanation of the relationship between equality, diversity and work-life balance policies and associated gender implications. By answering the questions with these research tools, this research makes an original contribution to the published research on work-life balance policies in the UK.

3.3 Qualitative research strategies

Qualitative research strategies are the primary research method used to examine and analyse the gender implications of work-life balance policies. Qualitative research seeks to give meaning to social experience. Researchers shape the inquiry through emphasising 'the socially constructed nature of reality' (Denzin and Lincoln, 2000, p3). Snape and Spencer (2004, pp3-5) summarise key elements that give qualitative research its character, which includes; that it attempts to provide an in-depth and interpreted understanding, that samples are small and purposively selected, that data are rich, analysis is open to emerging ideas, and that conclusions provide an interpretation with social meaning. The aim of qualitative research is to gain a holistic understanding of what is being studied, that includes explicit and implicit meanings (Miles and Huberman, 1994).

Qualitative strategies imply that the emphasis will be on 'process and meanings that are not experimentally examined or measured' and seeks to provide 'answers to questions that stress *how* social experience is created and given meaning' (Denzin and Lincoln, 2000, p3). Discussion of qualitative research is situated within the broader literature on positivist and interpretivist paradigms. Bryman (2001, p12) defines positivism as 'an epistemological position that advocates the application of the methods of the natural sciences to the study of social reality and beyond'. And whilst this definition is debated

and discussed within the research methods literature, the core components are consistent and include strategies with variables that can be quantified and tested against hypotheses. In contrast to positivism, Bryman (2001, p13) defines interpretivism as 'predicated upon the view that a strategy is required that respects the differences between people and the objects of natural sciences and therefore requires the social scientist to grasp the subjective meaning of social action'. Therefore, interpretivism aims to understand human behaviour and meanings.

Drawing on these definitions, qualitative strategies allow for a more nuanced understanding of some of the complexities that underlie how organisations approach equality. Whilst (published) quantitative data are analysed throughout this research, quantitative data do not adequately capture the intricacies required to address the defined research questions. Qualitative methods provided the opportunity to contribute a different perspective to the current literature on work-life balance policies.

3.4 Empirical data collection: Policy analysis and organisational case studies

3.4.1 *Policy analysis*

The UK Government's work-life balance agenda is analysed to gain an understanding of how policies are conceptualised. 'Policy analysis must be seen as very much an interpretative art' (Hill and Ham, 1997, p227) as any policy process is complex, with multiple actors, stakeholders, conflicting goals and obstacles to implementation. The analysis specifically relates to how work-life balance policies are currently defined and presented on the Government's agenda, aiming to explore the key drivers and themes that have been evident since 1997. It is a necessary step in terms of considering the central research problematic of how diversity has influenced the construction of work-life balance policies and the associated gender dimensions.

Sabatier (1999) identifies key stages in the policy process as agenda setting, policy formulation and legitimation, implementation and evaluation. And Hill and Ham (1997) categorise different types of policy studies common in the UK as studies of policy content, that focus on policy development; policy process, that focus on influences and formulation; policy outputs, that focus on expenditure and results; and evaluation studies that aim to assess impact. My analysis of the UK Government's work-life balance approach is about content and process, exploring the chronology, development, influences and formulation of policies with specific gender dimensions.

Government documents analysed include legislation, consultation and discussion papers. Policy analysis often indicates conflicting government priorities that may result in ad-hoc and piecemeal implementation (e.g. Rein, 1976), which is another theme explored throughout this analysis. Government policy documents were scrutinised to generate insight into the policy process as well as the content of work-life balance policies. Chapter 4 identifies some of the tensions within government policy on work-life balance policies, and the resulting policy agenda.

3.4.2 Case study research

Within qualitative research methods, case studies emerge as an effective method to address 'how' or 'why' questions. As a research strategy 'the case study is used in many situations to contribute to our knowledge of individual, group, organizational, social, political, and related phenomena' (Yin, 2003, p1). A case study approach therefore provides an effective strategy to enhance knowledge that could be set within the wider societal context.

Stake (2000) identifies three different types of case studies as intrinsic, instrumental and collective. The intrinsic case study is where the case itself is the primary research focus; the instrumental case study is where the case study is analysed to support and facilitate

broader understanding; and the collective case study is where cases are linked to explore a broader phenomenon. Each of the case studies undertaken as part of this research has its own intrinsic value but, as discussed below, they are reflective of a particular context. Common criteria allow for the case studies to be classified as instrumental, by extrapolating common themes to understand the broader gender dimensions of work-life balance policies in the UK.

The extent to which case studies allow for generalisations is debated in the research methods literature (Gomm, Hammersley et al., 2002; Stake, 2000; Yin, 2003). Lincoln and Guba (2002) highlight that generalisations in case studies are often critiqued on the grounds that they have a specific context which may not be transferable and are dependent on the assumption of determinism. By definition, case studies are particular investigations. For the intrinsic case study, its particular context does indeed restrict the ability for a researcher to generalise from it. But generalisations would not be the aim of an intrinsic case study. It is possible to generalise from an instrumental case study because it explores common features and the surrounding context (Stake, 2000). Case studies can draw wider inference – but there needs to be an appropriate understanding of the boundaries in doing this (Ritchie and Lewis, 2004). Lincoln and Guba (2002, p40) suggest that ‘the degree of *transferability* is a direct function of the *similarity* between the two contexts, what we shall call *fittingness*’. The social researcher must make the judgement about the extent to which the case studies ‘fit’. In the case of this research, the selected case studies provide scope for some generalisations, albeit with important caveats. The case study organisations in this research were purposively selected according to a number of defined criteria (outlined below). Critical to their selection was the existence within the organisation of a progressive equality, diversity and work-life balance agenda. This shared criterion across the case study organisations, allows for trends and patterns to be analysed, in that there may be similar benefits and / or shortcomings experienced in these organisations. However, the boundaries of the

differing selection criteria, such as different-sized organisations in different sectors, ensure that each case study also has intrinsic value. The history of each organisation regarding its equality trajectory also differs.

Case studies are common in the work-life balance literature and are often used to promote good practice organisations (e.g. Lewis and Cooper, 2005; DTI, 2003). My research contributes to this evidence base by developing a framework that combines documentary analysis with insights from key stakeholders in progressive organisations. Selecting organisations committed to equality and diversity with progressive work-life balance agendas was essential (discussed below). As 'good practice' organisations, it was expected that these case study organisations would be more explicit and progressive in articulating an understanding of equality and diversity. In addition, if diversity was shown to be potentially problematic for gender equality in these organisations, it would suggest that less 'progressive' organisations may also be struggling to varying degrees, in the pursuit towards gender equality.

3.4.3 Recruiting specific case study organisations

In order to answer the defined research questions, it was necessary to search for case study organisations that satisfied specific requirements. 'Case study research is not sampling research' (Stake, 1995, p4), allowing for the careful and purposeful selection of case studies according to defined criteria. The main criteria in selecting organisations to participate in this research were that:

- they were committed to equality and diversity
- they had a progressive work-life balance agenda
- there were both public and private sector examples from different industries, and organisations of different sizes to show differences in approaches.

The rationale for these requirements is discussed below. A Central Government Department (CGD), Arm's-Length Management Organisation (ALMO) and a Financial Services Company (FSC) agreed to participate in this research and satisfied the defined criteria.¹⁸ The balance and variety of case studies were viewed as important overall criteria (Stake, 2000) and case studies were purposively selected to fulfil the necessary criteria.

To explore the extent to which organisations framed work-life balance policies by diversity, organisations had to be committed to equality and diversity. According to the Workplace Employment Relations Survey (WERS), the number of organisations that have formal equality policies (that include diversity policies) has increased (Kersley, 2006). In 1991, just over half of companies surveyed for a particular report¹⁹ had a statement of equal opportunities in their annual reports (Industrial Relations Review and Report, 1991). By 1996, this had increased to over 80 per cent of the top 100 publicly listed companies (Industrial relations services, 1996). The most recent WERS data from 2004 illustrated that 73 per cent of workplaces had a formal policy – covering over 88 per cent of employees – which given the breadth of the WERS research shows a marked increase in coverage (Kersley, 2006). Whilst all the surveyed organisations comply with statutory requirements to promote equality and eliminate discrimination, there are differences in the nature and scope of policies offered. A more pro-active approach is visible in some organisations' formal policy documentation. This often includes an explicit commitment to diversity; where equality goals are commonly placed within this context of promoting diversity. Work-life balance indicators are often included in tables that rank organisations as 'good places to work' (e.g. DTI and The Sunday Times, 2004; McCall, 2005; The Times, 2007). In these lists, work-life balance policies are almost always part of the organisations' equality and diversity framework. The UK Government provides a

¹⁸ The terms 'Central Government Department' (CGD), 'Arm's-Length Management Organisation' (ALMO) and 'Financial Services Company' (FSC) were chosen in agreement with the participating case studies to protect anonymity.

¹⁹ The 90 top industrial and service companies (ranked by sales) and the top 10 financial institutions were surveyed in that particular research.

minimum standard of statutory work-life balance provision, and encourages organisations to voluntarily enhance the range of policies that they offer to their employees (Chapter 4). As a result of this context, it was necessary to find organisations that exceeded the statutory provision.²⁰

In Chapter 4, the work-life balance narrative is presented as having evolved from 'flexibility', to 'family-friendly' and towards 'work-life balance', so that policies are for *everyone*. The London Borough of Brent is an example of one such organisation, where the council made 'the decision to introduce a work-life balance scheme that would be inclusive of all staff – rather than family-friendly measures that do not get support from men or women who do not have children' (Godwin, 2006a, p6). At this organisation, gender equality goals were also outlined for equality, diversity and work-life balance policies. Attempting to untangle aspects of this relationship is essential in exploring the gender dimensions of work-life balance policies. Therefore a commitment to equality and diversity is a necessary pre-requisite of any case study.

There are significant differences in how organisations approach work-life balance policies (and other policies) depending on characteristics such as size, sector and trade union representation. Tables 3.1 and 3.2 place the organisational case studies alongside data from WERS, demonstrating that they are in sectors where a comparatively strong commitment to equality exists. This again validates the selected case study organisations as relevant examples through which equality, diversity and work-life balance policies could be explored, particularly for these sectors.

²⁰ Tables 6.1 and 6.2 (Chapter 6) outline the case study organisations' work-life balance policies alongside statutory requirements.

Table 3.1: Presence of equal opportunities by workplace characteristic and case study organisation characteristics					
	Equal opportunities policy		Case study organisation characteristics		
	workplaces (%)	employees (%)	CGD	ALMO ²¹	FSC
All workplaces	73	88	✓	✓	✓
Workplace size					
10-24 employees	63	65			
25-49 employees	81	80			
50-99 employees	90	90			
100-199 employees	96	95			
200-499 employees	96	96			
500 or more employees	96	97	✓	✓	✓
All workplaces with 25 or more employees	86	92	✓	✓	✓
Sector of ownership					
Private	68	84			✓
Public	98	99	✓	✓	
Industry					
Manufacturing	52	80			
Electricity, gas and water	95	97			
Construction	71	84			
Wholesale and retail	71	84			
Hotels and restaurants	50	71			
Transport and communication	63	81			
Financial services	96	97			✓
Other business services	69	84		✓	
Public administration	100	100	✓		
Education	99	99			
Health	89	95			
Other community services	81	92			
Trade union membership					
No union recognised	63	78			✓
At least one union recognised	96	97	✓	✓	
Source: Kersley (2006, p238). Data from table 9.1					

²¹ For classification purposes (by the Office of National Statistics) the ALMO is considered to be a public sector organisation and falls into the Business Activity category of 'service industry'. Based on this information, I have classified it as 'other business services' in the public sector.

Table 3.2: Presence of equal opportunities policies by workforce compositions and case study organisations				
	Equal opportunities policies^	Case study organisation characteristics (%)		
	workplaces (%)	CDG	ALMO	FSC
Mostly women (over half) at workplace	80	✓ (65.9)		✓ (68.6)
Female employees				
25% or less	64			
26%-74%	74	✓ (65.9)	✓ (36.6)	✓ (68.6)
75% or more	80			
Ethnic minority employees				No data
None	66			
10% or more	82	✓ (14.8)	✓ (39.3)	
Disabled employees		✓ (4.5)		No data
None	70			
5% or more	81		✓ (7.3)	
Employees aged 16-21		✓ (7.4)		✓ (0.1)
None	72		✓	
25% or more	75			
Employees aged 50 or over		*		✓ (14.8)
None	65			
25% or more	69		✓ (26)	
* (data is collected in different age brackets, significant proportion of employees over 50). See Figure 5.2.				
^ Source (for first column): Kersley (2006, p239). Data from table 9.2				

Tables 3.1 and 3.2 illustrate that public sector bodies and / or large organisations with a high percentage of female employees (or minority ethnic or disabled employees) almost always have equal opportunities policies (Kersley, 2006). The public sector has long been associated with being an equal opportunities employer. The Government continues to highlight its commitment to equality and diversity, for example through a 10-point diversity plan that attempts to enhance diversity and equality throughout the Civil Service (Cabinet Office, 2005). Historically a greater level of employer relations support, as well as union representation, has been evident in the public sector compared to the private sector (Kersley, 2006). These characteristics suggest that a central government department would be a relevant case study, and that the case study is representative of the public sector. This representativeness provides insight into some of the wider changes in the public sector in the area of equality and diversity.

Although the ALMO is at arm's-length to a local council, contractual terms and conditions for existing staff remained largely unchanged, and many policies and procedures were inherited from the local council framework. The visible role of unions, a high proportion of female staff and an often formalised equality agenda are also characteristic of local councils (Branine, 2004; Coyle, 1989; Lovenduski, 1989; Tailby, Richardson et al., 2005). Compared to the other case study organisations, this case study had fewer females as a percentage of its workforce. This is the result of the way the local council's housing department was divided upon the creation of this particular ALMO. This ALMO's remit includes a large maintenance and repairs section which has a male dominated workforce. The ALMO's structure towards goals of equality and diversity has not changed – and has been guided by the local authority. The ALMO champions equality and diversity which has long been a goal for local councils. Public sector organisations as well as large private sector companies often have a dedicated HR department, which may also be perceived as beneficial to direct, monitor and implement equality and diversity policies.

Financial services companies, and in particular banks, have been leaders in the pursuit of equal opportunities in the private sector (Shaw and Perrons, 1995), perhaps because of the high numbers of female employees. Compilation lists of progressive organisations commonly include a significant proportion of financial services companies (DTI and The Sunday Times, 2004; McCall, 2005; The Times, 2007). And the financial services sector experienced a widespread increase in provision of work-life balance policies between 1998 and 2004 (Whitehouse, Haynes et al., 2007). These characteristics mean that the financial services organisation is also a relevant case study organisation.

The experiences of the identified case study organisations are often in contrast to small and medium enterprises (SME) where (informal) flexibility and creative solutions may be more prevalent (Dex and Scheibl, 2001), and perhaps fewer resources (financial and

HR) to support staff are available. WERS data found that small private sector workplaces with no recognised unions were amongst the most likely not to have an equality policy (Table 3.1). Whilst there may be more informal arrangements in small businesses, this is not always documented. Findings from the case study organisations therefore may not be applicable to SMEs.

This increase in prevalence in equality and diversity policies since the mid-1990s can be attributed to a variety of factors, both internal and external. Reasons vary, but are usually a combination of negative and / or neutral factors, such as organisations protecting themselves against discrimination cases and ensuring that they comply with legal requirements, and more positive factors such as demonstrating a commitment to the principles of equality (Dickens, 1999). Responding to specific problems in the organisation – like under-representation of certain groups, or seeking to extend to a particular market or customer base, as well as having a higher public profile – are other reasons given for adopting an equalities framework. The case studies illustrate some of the competing tensions, as well as the differences between organisations given their characteristics, workforce profile and history in the area of equality. In order to explore the gender dimensions of work-life balance policies, in the context of a changing equalities discourse, it was important that these organisations were progressive in their approach towards equality. It was also important to capture some organisational differences within the selection of case studies. They provided examples from the public and private sectors, and had different organisational characteristics based on size and sector.

Negotiating access into organisations proved to be very difficult (discussed in more detail below). A log is provided in Appendix A outlining some of the issues encountered.

Despite the difficulties, no compromises related to the required criteria were necessary to

secure participation; the case studies were all examples of organisations committed to equality and diversity and had progressive work-life balance agendas.

3.4.4 Documentary analysis and the interview process

The aim of undertaking case studies was to understand the detail and some of the nuances that defined each organisation's approach to equality, diversity and work-life balance. Case study evidence can be collected from numerous sources. Yin (2003, p83) identifies six specific sources of evidence as documents, archival records, interviews, direct observation, participant-observation and physical artefacts.

The method of investigation in each organisation consisted of analysing documents and interviews with key equality stakeholders in the organisation. Combined, this provided a comprehensive understanding of the equality framework and the gender dimensions of work-life balance policies within the resource limitations of my research. For each case study, internal documents and web-materials were examined to gain a broad understanding of the employer's approach towards equality. This was the first stage of the data collection process and informed the interview process.

Documentary analysis is a tool to understand 'naturally occurring data' (Ritchie, 2004), in that documents are analysed for specific information. For the case studies, documents were analysed to gather more factual information, for example the context of equality and diversity policies, workforce profile data, work-life balance policies and utilisation rates. Collecting these data not only provided an overview of the particular case study, but also the opportunity to analyse wider trends of similar organisations. The documentary analysis also included reviewing materials such as recruitment policies. The purpose of this analysis was to establish how the organisation framed equality, diversity and work-life balance policies, and provided the necessary scope to consider the conceptualisation and implementation of policies through the course of the interviews. The documents

were also used to corroborate evidence from other sources (Yin, 2003). In addition to this, each organisation was asked to fill in a questionnaire (Appendix B). These questionnaires asked for information on the workforce such as full-time and part-time work rates by sex, trade union representation figures, organisational provision of work-life balance policies and monitoring and evaluation data. They were completed by the contact person in each organisation and returned to me via email.

After learning about the organisation in this way, interviews were conducted with selected equality stakeholders. Interviews are perhaps the most common strategy used to collect 'generated data' (Ritchie, 2004), where experiences, events and opinions are told from a specific perspective. The aim of the interviews was to understand the detail and some of the nuances that defined the organisation's approach to equality and work-life balance.²² Individual interviews²³ were chosen as ideal for the ability to provide 'an undiluted focus on the individual' (Ritchie, 2004, p36-7). Based on other questionnaires that address work-life balance policies at the level of the firm, a semi-structured interview schedule was devised with open-ended and closed questions (e.g. Kersley, 2006; Lewis and Cooper, 2005; Rapoport, Bailyn et al., 2002). Interview questions were then adapted for this particular research and then more specifically modified slightly for each case study organisation.²⁴

The resulting interview schedule was 'a guided conversation' (Yin, 2003, p89) aimed at addressing key themes on equality, diversity and work-life balance, whilst also providing the opportunity for participants to add any further information they deemed relevant (Legard, Keegan et al., 2004). The semi-structured format allowed for narrow questions such as 'what policies does the organisation have that relate to work-life balance' to be posed alongside broader questions such as 'what do you think the aims of these (work-

²² A copy of the interview schedule (which was modified slightly for each organisation) is in Appendix C.

²³ With the exception of one interview where there were two participants, all the interviews were conducted with individuals.

²⁴ Pilot interviews were conducted with colleagues.

life balance) policies are for the organisation?' These open-ended questions provided latitude for the participants in articulating their response. Open-ended questions are beneficial when the interviewer has a degree of prior knowledge, so that probes and follow-up questions can be relevant and considered (Aberbach and Rockman, 2002). Open-ended questions can also increase the validity of these data as participants can answer from their own understandings; and that as people may like to explain and express their views, open-ended questions may increase receptivity of participants (Aberbach and Rockman, 2002). Questions related to the process of devising policies; how they are constructed; what influences are considered; the role of employees and trade unions in negotiation and / or consultation; and about encouragement of take-up and utilisation itself were generally open-ended for participants to draw on their understandings and experiences. Closed-questions were used to collect factual information such as job-title, responsibilities within the organisation and length of service.

The respondents were carefully selected for the role that they played in conceptualising and implementing equality, diversity and work-life balance within their organisations. They included equality and diversity advisors, HR directors, staff / union representatives, and line managers. The combination of HR representatives / directors, trade union / staff representatives and line managers provided a spectrum in each case study organisation to understand the mechanics of how work-life balance policies were conceptualised and implemented. In addition it provided the opportunity to 'triangulate' or verify findings from different organisational perspectives. Some of these respondents were 'key informants' (Yin, 2003), who not only provided essential information but also opened up further opportunities for additional interviews (conditional on the gate-keeping role outlined below). By drawing on 'key informants' questions emerge as to whether the interviews were in fact 'elite interviews'. Despite some of the respondents having similar characteristics as 'elite' respondents in that they held specific positions within a particular organisation, there are differences. Elite interviewing is often characterised by

opportunities for the interviewee to define (some of) the research parameters: 'In elite interviewing ... the investigator is willing, and often eager to let the interviewee teach him [sic] what the problem, the question, the situation is ...' (Dexter, 2006, p19). This was not the case for this research. The participants were chosen for their particular role, knowledge and experience, but not to define the scope of the research.

HR professionals are critical in implementing, and often determining, the equality agenda in organisations. Often there are dedicated employees, either within a HR team or working in close collaboration, whose responsibility is for the organisation's equality remit. Trade union and staff representatives play a role in the equality and diversity framework of an organisation. And research has shown managers to be critical in the implementation of work-life balance policies in practice (Kirton, 2002; Yeandle, Phillips et al., 2003), particularly as Human Resource Management (HRM) strategies have become more common and administering work-life balance policies is often included as part of managers' devolved responsibility (Dickens, 1998). Because of this responsibility, in many organisations, the line manager is the gatekeeper of diversity policies (Noon and Ogbonna, 2001b). Findings reported in the *Third Work-life Balance Survey* showed that 47 per cent of staff who submitted requests made them to their line manager / supervisor (Hooker, Neathey et al., 2007), suggesting that line managers are important stakeholders in an organisation's work-life balance agenda.

Given resource limitations, I initially requested to interview five members of staff in each case study organisation. In total 25 interviews were conducted (with 26 participants: 10 at the CGD, 11 at the AMLO and 5 at the FSC) between May and September 2006²⁵. The differences in access were a result of differing approaches to 'gatekeeping' by the case study organisations. Despite the varying levels of 'gatekeeping', I was able to access the key equality and diversity stakeholders in each organisation.

²⁵ Appendix D provides a summary of the interviews conducted.

The FSC was strict in monitoring access, allowing only the requested five interviews, one of which was very short. The FSC had a central head office with branches dispersed throughout the region. As policy was directed from head office, most of the interviews took place there. One interview with a manager was held in a local branch. Interviews were arranged for me by the deputy HR manager who was my contact at this organisation.

At the GCD and ALMO additional interviews were generated through 'snowballing' techniques where participants suggested additional people to contact. I was encouraged to contact potential participants and arrange interview times myself. The CGD has over forty geographical areas, with central headquarters in London. Central headquarters was responsible for directing policy. Therefore, all the interviews took place at the central office. Access to the organisation was through a senior HR representative (who I also interviewed). An initial email was sent out to potential participants by my contact outlining the scope of my research and indicating that I would be following up to arrange interviews. This meant that potential participants knew who I was, and that HR had authorised the research. The ALMO had a head office, and local housing offices throughout the borough. Most of the interviews were conducted at head office, with one staff representative and one line manager interview conducted at different local housing offices. Again, my contact at the ALMO was a senior HR employee, who (as at the CGD) compiled a list of relevant contacts and sent out an initial email which I followed up.

In accordance with standard practice, anonymity and confidentiality were assured throughout the interviews, and other than to the contact person in each organisation and myself, the participants' identities remain unknown. Informed consent was obtained from all the interviewees²⁶ (Appendix E). Most interviews were recorded and then transcribed.

²⁶ Ethical approval was granted by the University of Oxford to undertake case studies in September 2005.

Two participants requested that I did not record their interviews and I took notes instead. Two participants asked to see the finalised transcript before they were willing to approve its use.

Through documentary analysis of equality, diversity and work-life balance policies, and interviews with key equality stakeholders, gender dimensions begin to emerge; firstly in how organisations conceptualised equality and diversity, and then as a result of how they implemented their work-life balance agenda.

3.4.5 Analysis of data

Qualitative analysis is a constant process (Stake, 1995) and was undertaken using a variety of analytical tools. Yin (2003) reminds researchers that high-quality analysis requires attention to all the evidence, and this doctrine guided the analytical process. Ritchie and Spencer (1994) identify critical stages of data analysis that include; becoming familiar with the data, identifying a thematic framework, indexing or coding data, charting data, and mapping and interpreting data. This was the broad process that was followed to provide in depth, thorough and rigorous analysis.

Data were transcribed; I then familiarised myself with the data. Transcripts were read and re-read. In negotiating access with the participating organisations, I offered to write an internal report based on my findings for that particular organisation.²⁷ This was an important stage in analysing my data. Firstly, it provided me with the opportunity to be familiar with my data at an early stage and focus on each case study independently. Secondly, it provided senior managers with the opportunity to provide feedback on my findings, so that I was able to further analyse and validate them. I also received comments on all the internal reports from my contacts at each organisation, none of which changed my findings substantially.

²⁷ In the case of the ALMO, I presented this report which informed the work of the independent consultant who had been commissioned to help the organisation further develop its work-life balance agenda.

Transcripts were then analysed and these data coded / indexed, which is 'effective data-labelling' and part of the analytical process (Miles and Huberman, 1994). The transcripts were analysed primarily using a content analysis approach, as well as being subjected to a gender lens. Content analysis provides a method to analyse the actual content as well as the surrounding context (Spencer, Ritchie et al., 2004). Robson (2002) outlines the opportunities and shortcomings of content analysis techniques. The main disadvantages are that the availability of documents may be limited and that documents have almost always been written for purposes other than the defined research. The main advantages associated with this approach are that it is an unobtrusive method of collecting permanent data and can be low cost. The shortcomings associated with content analysis did not obstruct this research, as I was able to access a wide range of documents from the organisations themselves, and much of the documentation that I required was descriptive (such as workforce profile data and work-life balance policies), and so it did not matter that it was not written purposefully for my research. The advantages of it being unobtrusive and low cost aided my research process.

The process of coding provided a framework and method to begin to understand data in a coherent way, and offered opportunities to link patterns, identify common features and highlight tensions (e.g. Miles and Huberman, 1994; Ritchie and Lewis, 2004; Strauss and Corbin, 1998). Coding further provided opportunities to identify whether there were similarities and / or differences between the case studies. Strauss and Corbin (1998) present strategies for coding for grounded theory. Although this research is not based on grounded theory, the coding strategy and initial analytical steps are similar. Coding provides a systematic way to engage with raw data, to help build the analytical foundations. Categories and sub-categories are created to allow fractured data from different transcripts to flourish into themes (Strauss and Corbin, 1998). They are based on 'axial coding' that relates categories to their sub-categories (Strauss and Corbin,

1998). Decisions about themes, categories and sub-categories are made by the researcher and influence the way that further analysis occurs. The data collected was divided into two main sections; ‘equality and diversity’ and ‘gender dimensions of work-life balance’. Not unexpectedly, it reflects the questions asked in the interviews (Appendix C). The themes and sub-themes are displayed in Table 3.3. Deriving the necessary codes / categories is in itself a form of analysis (Ryan and Russell Bernard, 2000).

Table 3.3: Coding data, themes and sub-themes generated	
EQUALITY AND DIVERSITY	GENDER DIMENSIONS OF WORK-LIFE BALANCE
1.0 Equality on the agenda 1.1 What policies exist 1.2 Overall positive attitudes towards equality with some room for improvement	7.0 What is work-life balance? 7.1 Drivers for work-life balance 7.2 The role of the business case
2.0 Aims and drivers of ‘equality’ (equality and diversity) 2.1 Business case 2.2 Legislation 2.3 Reflecting customer base 2.4 Other	8.0 Implementation of work-life balance policies 8.1 Utilisation rates 8.2 Organisational culture 8.2.1 <i>Positive</i> 8.2.2 <i>Negative</i> 8.3 Obstacles to take up of work-life balance 8.3.1 <i>Presenteeism</i> 8.3.2 <i>Resistance by managers</i> 8.3.3 <i>Other</i>
3.0 What is equality and diversity? 3.1 What is equality? 3.2 What is diversity?	9.0 Eligibility for work-life balance policies 9.1 Everyone 9.2 Seniority 9.3 Formality 9.4 Parents 9.5 Backlash 9.6 Specific policies (e.g. flexitime)
4.0 Challenges to equality and diversity 4.1 Race = equality 4.2 Hierarchy of equalities 4.3 Intersections of equality 4.4 Legacy of previous approaches	10.0 Communication
5.0 Policy development 5.1 Consultation 5.2 Trade unions 5.3 Non trade union reps 5.4 Equality networks 5.5 Equality dimensions of development	11.0 (Lack of) monitoring and evaluation
6.0 The relationship between equality and work-life balance	12.0 The role of the manager
	13.0 Gender 13.1 Career progression 13.2 Gender = women 13.3 Traditional stereotypes prevailing 13.4 Evolving discourse 13.5 Genderblind
	14.0 Future development / evolution of equality/diversity/work-life balance
	15.0 Sector specific

Analysis took place at every stage of the research process. For example, devising the research questions and meeting the contact person in each organisation contributed to the research. In order to validate and clarify the data from numerous perspectives, the data were triangulated. This allows for varied perceptions to be adopted to clarify meanings and provides a way of checking data (Stake, 2000). Triangulation is a useful tool to work across research strategies (Bryman, 2001) and provided a way to verify and cross-check data; for example between the organisations' documents and interview data.

3.4.6 Potential and limitations of findings

Like any research project, this research had limitations. Firstly this research was not able (and did not intend) to capture how equality, diversity and work-life balance related to individual experiences. Much research has been published on employer and employee attitudes, experiences and take-up of work-life balance policies (e.g. Hogarth, Hasluck et al., 2001; Hooker, Neathey et al., 2007; Woodland, Simmonds et al., 2003). Government-sponsored work-life balance surveys have shown a general increase in availability and utilisation of work-life balance policies since 2000 (see also Tables 4.2 and 4.3). They have also highlighted some of the common criticisms voiced by organisations. This research did not ask individuals about their experiences of work-life balance policies, or the organisations' experiences as this was not the focus of this research. A second limitation was that the focus was biased towards the 'work' aspect of work-life balance policies. Interviews were intentionally conducted with workplace equality stakeholders and focused on workplace policies. Household decision making was beyond the scope of this research.

Resource implications dictated a maximum of three case study organisations, which limits the ability to generalise to some extent. Although as a D.Phil student, this research was a significant undertaking nonetheless. Negotiating access to organisations was difficult (Appendix A). Access was challenging in part because of the perceived time and

resource implications for the organisations. However, once I outlined my requirements and offered to produce an informal report for each participating organisation, organisations were more willing to participate and I was able to secure commitments from the participating organisations.

Whilst interviews are beneficial tools to gather individual data, a note of caution must be added about bias. Interviews are framed and interpreted at a number of different stages. For example, choices about interview participants, the knowledge that the interviewer brings to the interview and how data are analysed are all different layers of interpretation. Interview participants are not objective and cannot be removed from the context in which they operate (Fontana and Frey, 2000). Whilst this can be seen as a shortcoming for some studies, for this research it was an advantage. The strategy was deliberately constructed to ask people about their understandings of how equality, diversity and work-life balance were conceptualised and operated in the workplace.

3.5 Conclusion: A new contribution to the literature

Through carefully selected techniques, the relationship between equality, diversity and work-life balance policies is explored in this thesis. The research strategy was chosen as the best way to address the identified questions. In the UK and internationally, much data have been published in the field of work-life balance – both qualitative and quantitative. Quantitative data in the UK tends to focus on the increase in utilisation rates of various work-life balance policies and satisfaction levels and attitudes (of employers and employees), as well as the perceived advantages and limitations of work-life balance policies (e.g. Hayward, Fong et al., 2007; Hogarth, Hasluck et al., 2001; Hooker, Neathey et al., 2007; Kersley, 2006; Woodland, Simmonds et al., 2003). Additional studies focus on particular aspects of qualitative and quantitative aspects of work-life balance policies. For example Smeaton and Marsh (2006) have published research on maternity and paternity rights and benefits, Camp (2004) has evaluated the right to request flexible

working (after its first year), and more recently Fitzner and Grainger (2007) have also evaluated the 'right to request'. These sources are used extensively throughout this research, in order to provide baseline data and a relevant context for the case study organisations. These data are effective in establishing that the Government's work-life balance agenda has penetrated into organisations. Whilst problems of the work-life balance agenda are often identified, the published research does not adequately contextualise the reasons, and these often have clear gender dimensions and implications. The published research is also useful in charting changes over time and changing attitudes, but it is not able to effectively explore the nuances or the reasons for these changes, or their possible gender dimensions. The aspiration to delve further into some of these issues, and thereby to explore an area that is currently under-researched, provided the impetus for the research strategy used.

4.0 WORK-LIFE BALANCE POLICIES IN THE UK CONTEXT

4.1 Introduction

This chapter explores 'work-life balance' in the UK context. It argues that the development of work-life balance policies in the UK is, in part, located in a 'managing diversity' framework, highlighting an expanding equalities agenda as well as a focus on individual choice (Chapter 2). The implications of these themes for progress towards gender equality – the ability for men and women to make genuine choices – are problematic. Like 'managing diversity', the rhetoric of work-life balance policies is gender neutral, not necessarily recognising gender disparities in the workforce and in the home.

In the first part of this chapter, the evolution of 'work-life balance' the term that has the most currency in the UK context, is considered. Work-life balance policies have emerged partly in response to the demographic, social and workplace trends highlighted in Chapter 1. The term work-life balance has developed from 'flexibility' and 'family-friendly', although at times these terms and concepts overlap. This overlap of terms highlights a tension about whether the work-life balance agenda is for everyone, or should only be for parents and carers. Questions are also posed about what exactly is meant to be 'balanced'. Alternative terms are suggested that offer approaches to progress these tensions; for example, by considering a life-cycle approach or by considering harmonisation strategies, which have the potential to resolve rather than 'balance'.

The second part of this chapter presents the UK Government's work-life balance agenda through the analysis of government documents that include legislation, policy reviews, consultation and discussion documents, as well as government-sponsored research. The election of a Labour government in 1997 is considered a turning point, signalling the development of a more coherent work-life balance agenda. There have been two major routes through which the work-life balance agenda has developed: through providing opportunities for people to balance work and other responsibilities (mostly through

legislation); and through encouraging employers to recognise the business case for work-life balance policies and enhance organisational provision. These aims are at times contradictory and at other times overlapping. They are set within the wider context of increasing women's labour market participation and a commitment to labour market efficiency and fairness (DTI, 1998). The business case is promoted as an effective way to enhance productivity, and in doing so chimes with the 'managing diversity' agenda of recognising and harnessing the potential contribution of each individual employee.

This analysis illustrates that on the one hand, the Government presents the work-life balance agenda as being for everyone, but on the other hand, work-life balance policies seemingly exist to support parents and in particular mothers. The implications for maternity, paternity and parental leaves are explored. The analysis then proceeds to evaluate the right to request flexible working and whether it is an effective mechanism to extend work-life balance provision beyond parents. The business case as a central driver of the work-life balance agenda is also explored. The extent to which choices are constrained, and gendered stereotypes of work and care emerge as important themes. The analysis adds to the foundations established in Chapter 2 that explore how (and why) organisations have shaped their particular work-life balance agendas in practice (explored further in Chapters 5 and 6).

4.2 What should be balanced? Towards a definition of work-life balance

The terminology of 'work-life balance' in the UK has evolved from 'flexibility' and 'flexible working' (which was frequently used throughout the 1980s), to 'family-friendly' (which became more popular in the 1990s). Since the late 1990s, 'work-life balance' is the term that is most recognised in the UK context and has the most purchase with government, employers and employees. This trajectory does not necessarily reflect a linear progression of ideas as there is much overlap between these terms and they are often used interchangeably – despite their differences particularly in the way that they

emphasise different aspects of the work-life relationship. 'Work-life balance' incorporates 'flexibility' and 'family-friendliness'. The UK Government's preference for the term 'work-life balance' is significant; as it indicates an expanded agenda that is for everyone (and not just parents), and encourages businesses to adopt the business case that includes a focus on the potential of each employee. In this way, the work-life balance agenda is tied to diversity – and more importantly 'managing diversity'. This has potential gender implications.

Many of the changes in employment (see Chapter 1) in the 1980s and early 1990s were classified under the term 'flexibility', which became a management buzz-word in the 1980s (Hewitt, 1993). The growth of the service sector and decline of manufacturing industries were significant drivers in the increase of flexible work opportunities (Hogg, Harker et al., 1992). Widespread deregulation encouraged by the Conservative government (Smithson, Lewis et al., 2003), as well as unions arguing for a shorter working week (Horrell, Rubery et al., 1991), were further contributing factors leading to more flexible work opportunities.

The term flexibility has a number of different applications. Drawing on the wider literature, Perrons (1999) differentiates between 'numerical or defensive flexibility' and 'functional or adaptive flexibility'. Numerical or defensive flexibility refers to an organisation being able to adapt its labour force to demands. This often requires changes in working patterns and is closely associated with the feminisation of the workforce. In contrast, 'functional or adaptive flexibility' is more progressive and multi-dimensional in its ability to adapt to the changing needs of firms and employees and consumer demands. Although flexibility can benefit both the employer and employee – for example by improving rates of productivity and creating choices in working hours – it has broadly been used by employers as 'numerical' – as a way to regulate work flow and reduce costs.

Part-time working, particularly for women has been the most common form of flexible working. Particular types of employment are more likely to offer flexible working – for example in the service sector – where disadvantages such as vulnerability, low pay and lack of job security are significant. This type of ‘numerical’ flexibility is not always flexible in practice. Flexible working can be a misleading term as there may be little or no flexibility in employment; for example, part-time workers may have rigid working patterns.

By the mid-1990s, ‘family-friendly’ was commonly being used as the term to describe flexible working. Whereas flexible working was perceived to adapt to changing working conditions, ‘family-friendly’ policies responded to the specific needs of mothers of young children and facilitated their labour market participation (Houston and Waumsley, 2003). Debates surrounding family-friendly provision were beginning to emerge onto the political agenda. ‘Family-friendly’ policies – such as maternity and parental leave had been passed at the EU level and despite the UK Conservative government’s reluctance to introduce these policies, they had entered the public discourse.²⁸ But the lack of government provision meant that employers were largely responsible for providing for their employees. Research from the US in the 1990s (where similarly no legislative family-friendly provision was available) suggested that availability of family-friendly policies was more prevalent in large organisations with human resource specialists and / or organisations with a high proportion of female employees, or high proportions of women in management (Dex, 2001). Policies in general addressed benefits²⁹ and allowed for modifications in working schedules. The rationale was mainly to ensure retention of employees in an increasingly global competitive market (Gonyea and Googins, 1996). The ‘business case’ was developing with a focus on recruitment and retention of mothers’, further influenced by the ‘managing diversity’ discourse (Chapter 2) that was emerging in the UK at the same time. Family-friendly policies are criticised as

²⁸ After much debate paid maternity leave was reluctantly introduced in the UK by the Conservative government in 1994, paternity leave was not introduced until 1999 (see Appendix F for more detail).
²⁹ For example, occupational healthcare cover is of particular importance in the US context as there is little state provision.

they overlook a diverse range of roles and family structures by focusing on parents and occasionally on those with eldercare responsibilities (Lewis, 1996). Despite the change in language towards a more family-friendly focus, flexible part-time work for women with young children remained the focus.

The term 'work-life balance' widens the policy agenda to 'all employees and their personal lives outside of work' (Dex and Smith, 2002). Work-life balance is the term now most commonly used in the UK for debate and discussion about combining responsibilities, though there is no universally accepted definition of work-life balance.

The UK Government through the Department of Trade and Industry (DTI)³⁰ has described work-life balance as being:

'about adjusting working patterns. Regardless of age, race or gender, everyone can find a rhythm to help them combine work with their other responsibilities or aspirations' (DTI, 2004c).

The DTI categorised work-life balance provision into the categories of: when staff work³¹, where staff work³² and giving staff a break³³ (DTI, 2004f). Services, amenities, and other benefits³⁴ are also considered to be work-life balance policies. This definition far exceeds the responsive nature of family-friendly approaches. It shifts what is on offer and who is eligible. This wider focus poses significant policy challenges to the Government about the extent to which work-life balance policies should (and could) provide genuine opportunities for everyone. In addition it raises questions related to how policy priorities should be addressed and prioritised (particularly in organisations); for example, should caring responsibilities be given the same priority as learning opportunities and hobbies?

³⁰ In 2007, the Department of Trade and Industry (DTI) became the Department for Business, Enterprise and Regulatory Reform (BERR). BERR is the department with responsibility for employment matters. This definition was first proposed by the DTI and is no longer available on BERR's web-site.

³¹ For example job sharing, term-time working, time off in lieu, flexi-time, compressed working hours, annualised hours, shift working, shift swapping, self-rostering, staggered hours, phased or flexible retirement and part-time working.

³² For example home working and tele-working.

³³ For example maternity, paternity and adoption leave, parental leave, sabbatical/career breaks and study leave.

³⁴ For example childcare assistance (nursery, vouchers, subsidies, advice), eldercare assistance, access to leisure facilities and counselling services. Other benefits could also include government tax credits, which are recognised as important, but are not discussed in this research.

The definition above suggests that they should, whereas the reality (and data from the organisational case studies in Chapters 5 and 6) has been somewhat different.

Implying that work-life balance is for everyone masks some of the differences that perpetuate gender inequalities. Firstly it raises questions about the relationship between 'work' and 'life', suggesting that they are separate and require 'balancing'. Gambles, Lewis et al. (2006) contend that the terminology of work-life balance is superficial and simplistic. A further obstacle identified is that 'life' should fit around 'work'. This undervalues care work, either because it needs to be balanced with paid employment or by presenting care as a dimension of 'life' or not as 'work' (Gambles, Lewis et al., 2006). Again, this is gendered as women provide a disproportionate amount of care (Williams, 2004). The idea of 'balance' is also critiqued partly because it implies a trade off between work and life. Further criticisms include that 'balance' has several simultaneous meanings: it is used as a noun, as something to achieve; a verb to balance demands; or as an adjective, 'a balanced life' (Greenhaus, Collins et al., 2003, p511). As a result of these conflicting meanings, Greenhaus, Collins et al. (2003, p513) propose three different dimensions of balance: time balance, with an equal amount of time devoted to work and family roles; involvement balance, with equal psychological involvement in work and family roles; and satisfaction balance, with an equal level of satisfaction with work and family roles. These dimensions of time, involvement and satisfaction are beneficial in further developing a more considered understanding of the complex components that each individual needs to negotiate, but there is an implicit assumption that balancing has to be equally divided within each category – whereas the relationship between work and life is more porous with constantly changing boundaries (Pocock, Skinner et al., 2007a). A life-cycle approach, acknowledging that different types of balance are required at different life stages, could begin to reconfigure the narrative of work-life balance to be responsive to people in different situations (Fagan, Hegewisch et al., 2006; Williams and Jones, 2005). In addition, current definitions of work-life balance

often relate to the workplace and home and do not account for other activities such as leisure time (Bittman and Wajcman, 2000; Warren, 2004).

The term 'work-life balance' itself is further criticised for obscuring gender issues in preference for a business case that is more palatable for employers and does not necessarily require significant policy change (Hoque and Noon, 2004) (discussed in more detail below). Work-life balance is presented as a gender-neutral term, that is applicable to the entire workforce; but, given the gender disparities in the workforce and that workplace culture is often gendered (Haas and Hwang, 1995), it is instead considered by many commentators to be 'gender-blind' (Smithson and Stokoe, 2005).

In addition to the work-life balance discourse being gender-blind, work-life balance has also been criticised for ignoring the heterogeneity of the labour market and of families. This is despite work-life balance policies often being part of a diversity framework that is meant to recognise different needs for different women and men. For example, data presented in Chapter 1 demonstrate differences in employment rates for women and men by age, suggesting that some older workers may be willing to be active in employment if more flexible opportunities were available such as part-time working and flexible retirement. And there are differences in employment rates based on ethnicity. For example, from an analysis undertaken between 1992 and 2002, it was reported that 'Black' women were more likely to remain in full-time employment when their children were young, whereas 'White' and 'Indian' women tended to work part time (Lindley, Dale et al., 2004). And lone parents have different 'work-life balance' requirements to coupled parents. These examples suggest that work-life balance policies, although part of a diversity framework, are not complex enough to respond to a variety of preferences and requirements of working parents.

Furthermore, opportunities provided by employers to 'balance' work and life are distributed disproportionately through the job hierarchy (Lambert and Waxman, 2005), creating different 'choices' for men and women depending on their position in the labour market. Often those at the lower and higher ends of the job hierarchy have fewest opportunities to balance work and life. For example, low-income women (with caring responsibilities) may not have the option to reduce their working hours due to the potential loss of income. Similarly, high-earning women may be constrained and not able to alter their working hours due to the potential shedding of responsibility. An additional phenomenon entitled the 'brain drain' has been identified for high-earning women. A study in the US identified 37 per cent of highly qualified women subscribing to an 'on/off ramp' career pattern which means that they have taken a 'voluntary' career break, with a further 28 per cent taking 'scenic routes' by way of flexible working – with both routes incurring financial penalties (Hewlett, 2005). Several web-sites³⁵ have emerged in the UK set up by women who were classified as high earners before they had children, trying to connect employers to mothers, and encouraging employers to capitalise on providing flexible opportunities for qualified employees (Britten, 2006). This again demonstrates the different obstacles that the work-life balance narrative needs to address.

In addition, there is a gap between well-educated women working full time and less well-educated women pursuing part-time employment. Upon entering motherhood these women display different characteristics in their willingness (and ability) to combine paid work and childcare. Mothers with higher level qualifications (and usually higher income) have shown a greater determination in wanting, and being able to combine paid work and childcare (Dale, 2005). These differences suggest that locating work-life balance policies within a context that emphasises diversity may be beneficial. The combination of socio-economic factors, work status, and ethnicity are just some of the characteristics that highlight the different gendered effects of policies for different groups of men and

³⁵ For example, www.mumandworking.co.uk and www.workingmums.co.uk

women (Perrons, Fagan et al., 2006). It is clear that a range of policy responses are necessary to respond to a range of differences.

4.2.1 EU: A focus on reconciliation

Up until recently, the EU has opted for 'work-family reconciliation' as its preferred term which has been on the EU's agenda since the mid-1990s. Work-family (as opposed to work-life) delineates a clear remit for policy provision, that it is about families. In contrast to balance, reconciliation 'implies an attempt to harmonize or bring together different activities or interests so that they can be conducted with as little friction, stress and disadvantage as possible' (Moss, 1996, p23); and it is about 'sharing responsibilities of paid and unpaid work between men and women' (Employment and Social Affairs, 2006). Reconciliation is clearly linked to the European Employment Strategy as a key mechanism that will allow female employment targets to be reached. As a result although there seems to be recognition of the nuances between different terms, and an attempt to progress the agenda beyond facilitating women's employment, it seems as though the narrow focus on employment will obstruct progress beyond the labour market.

In a more recent EU publication, the meaning of reconciliation has seemingly broadened to 'reconciling work and private life' where the emphasis on families has been expanded. The EU narrative of reconciling work and private life is beginning to acknowledge a more nuanced approach to working time and organisation towards 'support for the private needs of citizens throughout their life cycle' through strategies such as offering more crèches, after-school activities, care for the elderly (and other dependents) and tax incentives (EC, 2007, p5). Given the focus on labour market participation and the EES targets, the expansion of the remit seemingly reflects the incorporation of carers. Despite gender equality being articulated as a goal, its link to employment rates limits the ability for sharing responsibilities of paid and unpaid work between men and women (Employment and Social Affairs, 2006). The EES targets highlight and facilitate women's

employment rather than emphasise opportunities for both men and women (e.g. Lewis, 2006). The EU's narrative has seemingly evolved further from 'work-family reconciliation' to 'reconciling work and private life' that is similar to the UK (which the EU usually influences rather than is influenced by), and expands the scope beyond parents. It is not yet clear what the policy implications (if any) will be from this expanded remit.

4.2.2 Beyond work-life balance: Shifting the narrative further?

Responses to some of the outlined criticisms have led to suggestions of alternative terms. The financial services company (FSC) case study organisation rejected the term 'work-life balance', for the associations that it had to government policy and bureaucracy – opting instead for 'working-life solutions' (Chapter 6). This is interesting given that work-life balance is the term deliberately used to appeal to business (discussed below). Alternative terms suggested by academic commentators and practitioners include 'work-life articulation', 'work-life integration', 'work-personal life integration' and 'harmonising paid work with other parts of life'. Work-life articulation refers 'to the processes and practices whereby individuals and families develop specific strategies to manage paid and unpaid work' and stands in contrast to 'balance' and / or 'reconciliation' which implies an equilibrium (Wall, 2007, p26). Work-life articulation is perceived to be more gender neutral (Crompton and Brockmann, 2006). Work-life integration implies 'when attitudes in one role positively spill over into another role, or when experiences in one role serve as resources that enrich another role in one's life' (Greenhaus and Parasuraman, 1999, p407). This suggests that work and life are components that have aspects which combine, rather than require balance, and is indicative of a more reciprocal relationship between work and life. 'Work-personal life integration' (Lewis, Rapoport et al., 2003) builds on that and presents a holistic approach, extending the remit of work-life balance policies to capture the 'synergies' and connections between different parts of life. It aims to progress beyond the current tensions of prioritising work, and to re-evaluate assumptions about gender, paid and unpaid work. It links work and life to 'other social

problems facing individuals, families, workplaces and communities' and connects them to expectations and values (Lewis, Rapoport et al., 2003). But 'integration' may imply too much overlap. 'Harmonisation of paid work with other parts of life' is based on values of equity, well-being and sustainability; including both strategies of integration as well as separation, and extends beyond individuals to families, organisations and society (Gambles, Lewis et al., 2006). Pocock, Skinner et al. (2007b, p5) state their preference for terms such as 'spill-over' or 'interaction', because 'work and life interact in complex ways that are better conceived of interactions rather than degrees of balance'. Although there is much debate about these terms, what is clear is that work-life balance requires a broader conceptualisation than just the balance between work and life because people's needs change over the course of their lifetime; and that broader cultural change is necessary to challenge normative assumptions about work and care.

In the workplace, there have been suggestions about linking work-life balance to a corporate social responsibility agenda (Grosser and Moon, 2005; Pitt-Catsoupes and Googins, 2005), as a way for employers and employees to understand the links between social and economic goals in the workplace. Whilst these terms progress the debate of work-life balance into issues of care and other parts of life, methods of implementation are harder to envisage, as it is not clear from the literature how any resulting policies would be developed and applied.

4.3 The UK Government's work-life balance agenda

Since 1997, the UK Government has considerably progressed the work-life balance agenda (Appendix F outlines the chronology of these developments). There have been two major routes through which the work-life balance agenda has developed; (1) through providing opportunities for people to balance work and other responsibilities (for example legislation on maternity, paternity and parental leaves and the right to request flexible working); and (2) through encouraging employers to adopt the business case and

enhance work-life balance provision (for example the work-life balance campaign).

These aims are at times contradictory and at other times overlap. The following section outlines the key developments and then discusses policy implications that focus on gender dimensions.

Documents on work-life balance have been published by a wide range of departments such as the Home Office, HM Treasury, Department for Work and Pensions (DWP), Department for Trade and Industry (DTI), and the Department for Education and Skills (DfES).³⁶ There is recognition that work-life balance is an area where the Government can and should intervene to provide people with the opportunities to make their own choices (PMSU, 2007). This marks a significant policy shift from previous Conservative governments, who were reluctant to interfere in the private sphere of the family (Ben-Galim and Gambles, 2008 forthcoming). The Government aims to provide people with opportunities to work, as well as recognising the fundamental role that people have in caring – mostly for children, but increasingly also for others. This policy agenda is also connected to broader aims, such as increasing employment rates, reducing child poverty rates and increasing childcare provision³⁷ (Dex, 2003). At the same time, the Government aims to achieve ‘prosperity for all’ (DTI, 2004b; 2005c) which is defined in terms of employment and productivity rates, where work-life balance policies are considered a necessary part of an effective and productive workplace.

4.3.1 The policy foundations: Supporting families and encouraging the business case

Providing opportunities for people to balance their work and other responsibilities has been a major priority for the Government since 1997. Shortly after Labour’s election victory in 1997, the then Prime Minister Tony Blair set up a Ministerial Group on the

³⁶ Since 1997 departmental names and remits in this area have changed. The Department for Work and Pensions (DWP) was created in 2001 from the Department of Social Security (DSS) and the Employment Service. The DTI has recently been replaced by the Department for Business, Enterprise and Regulatory Reform (BERR). The Department for Education and Skills (DfES) was operational from 2001-2007. Its predecessor (in part) was the Department for Education and Employment (DfEE) which existed from 1996-2001. In June 2007, the DfES was split into the Department for Children, Schools and Families (DCSF) and the Department for Innovation, Universities and Skills (DIUS)

³⁷ These priorities often overlap and will be discussed in relation to work-life balance policies.

Family 'to develop a coherent government strategy to increase the support and help available to families' (Home Office, 1999, p4). An output from this group was the publication of a Green Paper entitled *Supporting Families* (Home Office, 1998). It broke with tradition by making an explicit statement about family policy in the UK (Rake, 2001), placing family concerns firmly in the public domain. As the foreword emphasised, this was 'the first time any Government [in the UK] has published a consultation document on the family ... it is long overdue' (Home Office, 1998, p2). The consultation document emphasised that it was appropriate for the Government to have an active family policy remit, and legitimate to intervene in order to provide practical support 'to help parents do the best they can for their children' (Home Office, 1998, p3).

The consultation recognised that parents needed more support to care not only for children but also for sick, disabled or elderly family members. It outlined changes to the tax-benefit system, to develop affordable child care facilities, to extend maternity pay (from 14 to 18 weeks) and introduce parental leave. The introduction of parental leave responded to EU Directives that previous Conservative governments had been reluctant to support. Support for family-friendly policies was encouraged as being beneficial for both families and business.

Whilst these initiatives were welcomed, concerns were also raised. In the summary of consultation responses, policy proposals were criticised for not responding to the long hours culture in the workplace which was a barrier for both men and women; nor did it resolve how employers' need for efficiency would be harmonised with employees' need for flexibility (Home Office, 1999). The consultation also acknowledged a wide range of family diversity existed, but implied a preference for marriage (Home Office, 1998). Despite many references to parents, throughout the document it was clear that mothers were seen as requiring support to 'balance work and home' (Home Office, 1998, p24), arguably reflecting ambivalence towards the role of fathers and their caring

responsibilities (Kilkey, 2006). At this stage the language of family-friendly policies was used (discussed above). In order 'to create the best environment to balance work and home' (Home Office, 1998, p24), a basic fair framework of family-friendly employee rights needed to be established as well as the promotion of family-friendly employment practices. At this time, the business case was already gathering strength.

The emergence of work-life balance in preference to family-friendly was noticeable when on March 9, 2000 Prime Minister Tony Blair launched the UK Government's 'Work-life balance campaign'.³⁸ The campaign outlined the Government's intention to alter the parameters beyond mothers and families, towards everyone. Encouraging employers to enhance provision in this area was essential. The high profile campaign established a network entitled 'employers for work-life balance' which was an alliance of employers committed to 'promoting good practice', through raising awareness of the business case for implementing work-life balance policies. A discussion paper, *Changing Patterns in a Changing World* (DfEE, Scotland Office et al., 2000) was also published and a Challenge Fund launched, aimed at helping employers develop interest in work-life balance policies by providing financial assistance and consultancy services for employees to balance work and the rest of their lives. The campaign further established a Ministerial Advisory Committee on work-life balance, with the purpose of advising ministers on work-life balance partnerships. The campaign also included statements reinforcing the Government's aspirations to support working families.

However, unlike *Supporting Families*, this consultation paper was primarily about encouraging businesses to see the value in work-life balance policies. Flexible working practices were considered vital and part of the language required for businesses to adopt the work-life balance agenda. The press release announcing the campaign's launch focused on how flexible working arrangements could benefit business.

³⁸ The DfEE was the department initially responsible for the campaign. It later transferred to the DTI in 2001.

'The campaign will encourage employers to introduce flexible working practices which enable their employees to achieve a better balance between work and the rest of their lives. Evidence shows that there is a bottom line business benefit in doing this. Everyone has a life and responsibilities outside work. They may have children or other caring responsibilities, or simply want time to pursue other interests' (DfES, 2000).

Work-life balance policies could benefit business and employers. The campaign explored what could be done in the absence of regulation. No new legislation was proposed as part of the campaign. Instead, employers were encouraged to voluntarily alter provision and opportunities for their employees. The alliance of employers was critical in publicising the potential that work-life balance policies have for business and productivity, with the founding members representing a variety of sectors and including many well-known UK companies (DfEE, Scotland Office et al., 2000). The Challenge Fund offered genuine and accessible funds and support, also recognising that small companies experienced difficulties in implementing work-life balance policies (Scotland Office, 2000). By mid-2003, over £11 million had been awarded, with an evaluation report citing the benefits that both employers and employees had enjoyed (Nelson, Nemec et al., 2004). The work-life balance campaign indicated that the narrative had indeed evolved beyond just families:

'Some people talk of making jobs "family-friendly". We do indeed want to help employees who have family responsibilities. But we also want to see benefits for other people in work and for employers. So we are using the term "work-life balance". Good practice in work-life balance benefits everyone' (DfEE, Scotland Office et al., 2000, p4).

In defining what work-life balance meant, a checklist (Figure 4.1) for employers was developed that focused on encouraging employers to be an organisation committed to work-life balance.

Figure 4.1: Work-life balance: a checklist for employers

An organisation that is committed to work-life balance:

- Recognises that effective practices to promote work-life balance will benefit the organisation and its employees
- Acknowledges that individuals at all stages of their lives work best when they are able to achieve an appropriate balance between work and all other aspects of their lives
- Highlights the employer's and the employee's joint responsibility to discuss workable solutions and encourages a partnership between individuals and their line managers
- Develops appropriate policies and practical responses that meet the specific needs of the organisation and its employees, having regard to:
 - fairness and consistency
 - valuing employees for their contribution to the business, not their working pattern
 - monitoring and evaluation
- Communicates its commitment to work-life strategies to its employees
- Demonstrates leadership from the top of the organisation and encourages managers to lead by example.

Source: DfEE, Scotland Office et al. (2000, p4)

Work-life balance was for employers and organisations. The sharp emphasis on business posed questions whether the campaign was really targeting 'everyone' or whether it was targeting business. Upon moving from the DfEE to the DTI in 2001, the focus on employers and the business case intensified. Campbell (2006) suggests that the term work-life balance was deliberately and intentionally used to generate wider support from business. By shifting the focus away from perceived family or women's issues, work-life balance was meant to encourage employers to think more creatively about all their employees, rather than just parents.

4.3.2 Work-life and work-family: A conflicting agenda?

It is clear from the analysis thus far that a tension lies at the core of this policy agenda about whether the focus should be on parents, or whether everyone should benefit from work-life balance policies. But the tension between extending the narrative beyond parents, and the focus on parents remained as the Government's policy agenda continued to progress.

Alongside the work-life balance campaign, a Green Paper titled *Work and Parents: Competitiveness and Choice* was published (DTI, 2000b). The focus was on parents, although with reference to everybody being able to benefit. There is a clear distinction

from the work-life balance campaign and narrative which was referred to as being about encouraging and raising awareness amongst businesses. The premise of economic prosperity was immediately set in the foreword by the then Secretary of State, Stephen Byers:

‘Jobs and prosperity go hand in hand. The more people who want to work and are able to do so, the stronger the economy. The more people who make use of the scarce skills, the better for business. The more parents in work, the lower the level of poverty, including child poverty...’ (DTI, 2000b, p1)

The focus was on increasing the number of people in work, with implied benefits for parents. And the agenda had wider policy objectives. The business case further emphasised that the Government’s role was to help parents make choices:

‘The government does not wish to tell parents how to balance work and family responsibilities. Parents should make their own choices. But providing help to parents to balance work and family life is important for the economy, and for the welfare of children’ (DTI, 2000b, p4).

Flexible working ‘emerged as the most important area for giving working parents choice’ (DTI, 2000b, p27). The Green Paper proposed to; extend maternity leave and introduce paternity leave and pay; raised the proposal of sharing maternity leave between parents; and put forward proposals to enhance childcare provision (DTI, 2000b). This consultation was the first time that fathers had emerged as a specific policy concern in relation to combining work and parenting responsibilities (Kilkey, 2006). An associated research and analysis paper was published, with careful consideration of the differences between women’s and men’s employment patterns (DTI, 2000c). When these policies were translated into legislation (in 2003), paid paternity leave was introduced; however proposals for sharing maternity leave had slipped from the agenda, for the time being at least.

A further component of *Work and Parents* was the establishment of a Work and Parents task force (in 2001),³⁹ with a ministerial group⁴⁰ also established to support its work. The Taskforce was formed in response to the *Work and Parents* Green Paper (2000) 'to examine how parents' desire for more flexible work patterns can be met in a way which is compatible with business efficiency' (Work & Parents Taskforce, 2001, p4). It made recommendations to the Government to establish a right for parents to request flexible working which was translated into legislation in 2003. It attempted to balance the increasing need of parents for flexible working as well as ensuring that the concerns of businesses (and particularly small businesses) were addressed. Flexible working being the mechanism to often balance these varying requirements often conceals the multiple objectives within the flexibility agenda.

'On the economic side it is designed to expand the employment rate and retain women's skills, which are considered crucial for a competitive knowledge economy. On the social side, it is believed to promote work life balance ... flexible employment is expected to reduce child poverty' (Perrons, 2006, p258).

Balancing Work and Family Life (HM Treasury and DTI, 2003) was the next phase in developing the work-life balance agenda. It could be considered mostly about 'work-family', seemingly distancing itself from 'work-life', and focused on policies that support parents. Evoking the spirit of Beveridge's vision of a welfare state to help families, this consultation document outlined that although the reality for families had changed, supporting families was still a central responsibility of government. Again the Government's role was to facilitate parental choice for everyone's benefit – employers, employees and their children (HM Treasury and DTI, 2003). The main proposals in this consultation included 'an increase in maternity pay and leave; the introduction of paid

³⁹ Taskforce membership: Professor Sir George Bain (Chair) – President and Vice-Chancellor, The Queen's University of Belfast; Fiona Cannon – Commissioner, EOC; Kay Carberry – Head of Equal Rights, TUC; John Cridland – Deputy Director-General, CBI; Martyn Gayle – Managing Director, Martyn Gayle at Aveda; Michael Griffin – Director, Human Resources, Kings College Hospital Trust; Anne Minto OBE – Director, Human Resources, Smiths Group PLC; Sue Monk – Chief Executive, Parents at work; Maureen Rooney OBE – General Council, TUC; Simon Topman – Managing Director, J Hudson & Co (ACME Whistles) Ltd.

⁴⁰ The ministerial group was chaired by Stephen Byers – Secretary of State for Trade and Industry. The other members were: Baroness Jay – Minister for Women; Andrew Smith – Chief Secretary to the Treasury; Lord Falconer – Minister of State, Cabinet Office; Tessa Jowell – Minister of State, DfEE and Minister for Women; Margaret Hodge MBE – Parliamentary Under Secretary, DfEE; Baroness Hollis – Parliamentary Under Secretary, DSS; Alan Johnson – Parliamentary Under Secretary, DTI; David Irwin – Chief Executive, Small Business Service.

paternity and adoption leave; and a new right for parents of young children to have requests for flexible working considered seriously by their employers' (HM Treasury and DTI, 2003, p7). A further significant focus of this consultation was on reforming and expanding tax credits (Brown, 2003). Work-life balance was deliberately used to broaden the agenda beyond parents throughout the work-life balance campaign, however it seems as though it was not used intentionally throughout this consultation. The consultation document referred to work-life balance as an illustration of how working in partnership with business could be beneficial for everyone:

'The [work-life balance] campaign promotes flexible working across all businesses in the public, private and voluntary sectors. DTI is working with businesses to convince them of the benefits of flexible working, and are at the same time providing advice on how they can develop flexible working approaches. The Work-Life Balance Campaign is not prescriptive but encourages employers to implement policies and practices over and above the legal requirements. The campaign is intended to benefit all employees whether or not they have caring responsibilities. Various guides and publications have been produced as part of the campaign' (HM Treasury and DTI, 2003, p38).

In this consultation document, there is a clear distinction between 'work-life' and 'work-family'. Interestingly this consultation was jointly published by the Treasury and the DTI. The Treasury under the leadership of (the then) Chancellor Gordon Brown had been the department driving the agenda to eradicate child poverty and reform tax credits. In this area, the Treasury's publications mostly referred to family-friendly policies, linking them to child poverty, and social exclusion, and referred to work-life balance as separate and addressing the business case. Perhaps the Treasury's aim was to ensure that the focus remained on parents. But the joint publication with the DTI meant that an employer focus was necessary. Perhaps it was the result of political tensions between Prime Minister Blair and Chancellor Brown at the time, which have been widely documented. Or perhaps it represents the potential difficulties, overlap and contradictions that arise when different departments develop different strands in the same policy area. Whilst the Treasury was supporting parents, the DTI was encouraging employers to adopt work-life balance policies. These are not mutually exclusive aims, but they perhaps represent different priorities of different departments working together.

*Work and Families: Choice and Flexibility*⁴¹ (DTI, 2005d) was the next stage in advancing the work-life balance agenda. Like *Changing Patterns in a Changing World* (2000), the consultation was introduced by linking the business case to work-life balance and the benefits that it could bring for employers, employees and the economy more generally.

'The foundations of a successful modern economy are the talent, energy and creativity of the millions of women and men who work in it. To succeed, every organisation has to find, keep and develop the best possible people. As the best employers recognise, helping employees to balance work and family life directly contributes to higher productivity and better performance' (DTI, 2005d, p4).

The consultation was again focused on the challenges that parents face in combining work and caring responsibilities, and how to enable choice. Educational development of children was also a prominent theme (DTI, 2005d). The measures included proposals for: a staged extension of maternity and adoption pay from six months to nine and then twelve months (with wider eligibility), simplification of the associated administration of maternity leave, enhanced communication between employers and employees during maternity leave, introduction of a period of transferable maternity leave (where the mother could transfer a portion of her leave to the father), and an extension of the right to request flexible working to carers of adults. Whilst the emphasis was on families, the interpretation was expanding. The proposal to extend the right to request flexible working to adult carers was indicative of extending the legislative remit beyond parents. The consultation document seemingly implored employers to see the potential productivity and loyalty benefits to be derived from extending the right to request flexible working (DTI, 2005d).

Responses to the consultation led to the adoption of the Work and Families Bill (2006) and to further consultation. The transferability of part of maternity leave to the father has

⁴¹ A series of documents were published as part of the *Choice and Flexibility* consultation. They included: Government responses to the consultation (DTI, 2005a), Regulatory Impact Assessment (DTI, 2005b), Draft Regulations on maternity and adoption leave and flexible working (DTI, 2006b), Maternity and adoption leave and pay regulations, Summary of Responses and Government Response to Consultation (DTI, 2006c), and Additional Paternity Leave and Pay (DTI, 2006a).

been proposed as Additional Paternity Leave (APL) where the father could take up to 26 weeks' leave (out of 52) if the mother returned to work before her maternity leave and pay have been used (DTI, 2006d). The idea of increasing fathers' entitlements, although welcome is flawed in its conceptualisation when viewed from a gender perspective. The consultation document is unequivocal that the entitlement is the mother's to transfer, which does not entirely respond to the data that the consultation highlights about valuing fathers' roles and enabling choice.

'The intention is that the mother will decide whether or not to transfer statutory maternity leave and pay to the father. It will be her entitlement to statutory leave and pay which will determine how much leave and pay the father will benefit from' (DTI, 2005d, p52).

Allowing the mother to transfer leave to the father if *she* so wishes reflects strong assumptions about maternal and paternal needs and responsibilities. The narrative seems to imply that fathers are 'helping' mothers and need to be 'more involved' to bring up their children, rather than share caring responsibilities.

'The consultation also proposed a possible new law to enable fathers and partners of adopters to be more involved in caring for their child during the first year of the child's life' (DTI, 2006d, p6).

'However, many fathers want to be able to spend more time helping to bring up their children and have greater choices about balancing their work and caring responsibilities' (DTI, 2005d, p50).

The consultation document implies that mothers should be the primary carers and fathers the primary earners (Working Families, 2005). As has already been argued, these stereotypes do not allow for women and men to realise their potential as carers and workers. The proposals also fail to recognise the shift in fathers wanting to become more involved in active caring for their children (Stanley, 2005).

Throughout the *Work and Parents: Competitiveness and Choice* and *Work and Families: Choice and Flexibility* series of documents, it seems as though the definition of work-life balance has been scaled back – particularly in contrast to the work-life balance campaign – and realigned to a focus on parents. 'Parents' in this context is not

necessarily an inclusive term, as the emphasis often refers to mothers – either to increase labour market attachment or as carers. This illustrates the somewhat contradictory goals that are evident through the Government's thinking on work-life balance. To some extent, when the business case is emphasised alongside workplace productivity, it seems as though the goal of labour market participation is emphasised with caring a secondary consideration. On the other hand, it seems that when the supporting families agenda is highlighted, there is a bias and priority towards mothers as carers.

This analysis of government policy documents has highlighted a number of key issues in the conceptualisation of the work-life balance agenda and also in how organisations should interpret it (discussed in Chapter 6). The analysis suggests that there are two principle routes pursued in the conceptualisation and articulation of work-life balance policies. The first is about supporting parents balance home and other responsibilities and the second is about encouraging employers to adopt work-life balance policies (which includes encouraging policies for all employees). There is obviously overlap between these areas. The Government's agenda seems to further imply that supporting families is essentially about supporting mothers, and that work-life balance policies – although encouraged to be for everyone – are about parents (and more recently carers). These outcomes have different implications, particularly in whether policies should target specific groups of workers and / or carers. They also highlight difficulties in the workplace about how to prioritise workers with different requirements, an issue that emerged in the organisational case studies (discussed further in Chapter 6). The issue of choice is also raised particularly in what choices women and men actually have to make decisions about work and care.

4.4 Implications for the Government's work-life balance agenda

The work-life balance chronology outlined above highlights prominent themes of choice, the business case as paramount and stereotypically embedded gendered assumptions. These are similar to the themes outlined in Chapter 2 that are associated with the 'managing diversity' narrative. The following considers some of the implications for the conceptualisation and implementation of work-life balance policies in the UK.

4.4.1 *Maternity, paternity and parental leave: A holistic package?*

The way that policy packages of maternity, paternity and parental leaves are configured can begin to address (or not address) gender inequalities (Deven and Moss, 2002); and significantly impacts parental choices at the time around a birth or adoption. Gendered assumptions are apparent in the way that the Government has framed these policies.

There have been major changes to maternity, paternity and parental leaves in the UK since 1997 (Appendix F). Maternity leave has been extended from 18 weeks' in 1997 to 52 weeks' in 2006 (with 39 weeks' of statutory maternity pay), and the rate of maternity pay has more than doubled (in 1997 it was £55 a week, since April 2007 it has been £112.75 per week). Legislation seems to make a positive difference to the number of women who take maternity leave, with increases in statutory leave and pay corresponding with increases in take-up (Smeaton and Marsh, 2006). Wage replacement levels are considered paramount in employees' decisions. For example, in a study on maternity and paternity leave, Smeaton and Marsh (2006) found that financial considerations are the single most important factor that explain the length of a mother's maternity leave.

The UK now offers the longest maternity leave in any OECD country (OECD, 2007), but the comparatively low wage replacement rate and that some of the leave is unpaid means that many mothers cannot afford to take it. Some organisations supplement

statutory maternity provision, which often increases the return rate of mothers'. Table 4.1 outlines the percentage of workplaces that provide their employees with provision beyond the statutory minimum in relation to leave policies.

Table 4.1: Extra-statutory leave arrangements, by workplace characteristics and the gender composition of the workforce

	At least some portion of maternity leave period on full pay workplaces(%)	At least some portion of paternity leave period on full pay workplaces(%)	Paid parental or special paid leave for parents workplaces(%)	Special paid (emergency) leave workplaces(%)	Leave for carers of older adults workplaces(%)
All workplaces	57	55	25	49	6
Workplace size					
10-24 employees	55	49	21	46	5
25-49 employees	59	58	27	50	3
50-99 employees	62	63	34	59	9
100-199 employees	53	66	38	55	9
200-499 employees	58	67	32	56	18
500 or more employees	65	77	41	70	24
Sector of ownership					
Private	51	49	21	43	4
Public	84	84	47	80	16
Trade union membership					
No union recognised	48	44	19	40	3
At least one union recognised	78	81	40	71	14
Proportion of female employees in the workplace					
25% or less	53	43	18	42	3
26-74%	59	61	27	51	5
75% or more	57	58	30	53	9

Source: Kersley (2006, p258). Table 9.7 extra-statutory leave arrangements, by workplace characteristics and the gender composition of the workforce

Again, the same organisational characteristics of large, public sector organisations with a union presence emerge as factors that make it more likely that provision will exceed statutory requirements. As a result of these characteristics, more highly-skilled professional women are likely to receive occupational maternity pay (Smeaton and Marsh, 2006).

Throughout the early 2000s, changes to maternity legislation and pay (Appendix F) have been associated with the increasing number of women returning to work after childbirth. Policy seemingly makes a difference as the right to request flexible working and a guarantee of a right to return to the same job are cited as reasons contributing to high levels of women returners (EOC, 2005b).

As discussed in Chapter 2, becoming a mother is 'one factor that above all leads to women's inequality in the labour market (Equalities Review, 2007, p66-7). The way that maternity leave and pay are configured therefore makes a significant difference, with the level of pay critical. Maternity leave provision and pay has different benefits and shortcomings for different women, depending on factors such income, job status, motherhood expectations and family circumstances. The number of children, and their age, are other factors that impact on decisions. Eighty per cent of mothers who were employed during pregnancy returned to work (with 88 per cent of them making changes to their working hours if they had one child and 68 per cent if they had more than one child) (Smeaton and Marsh, 2006). Maternal employment rates tend to increase when the youngest child reaches school age (see Chapter 1). And occupational status and class are also significant dimensions. For example low paid women or those who are self employed often do not take their full maternity entitlement (Smeaton and Marsh, 2006), as a result of low rates of maternity pay and the high costs of childcare.⁴² These are known factors to affect mothers' decisions. And Kamerman (in Moss and Wall, 2007) identifies additional questions (currently under-researched) such as how leave policies affect inequalities based on ethnicity and class. The way that maternity (and other parental leaves) develop will have an impact on equality.

⁴² A Childcare cost survey by the Daycare Trust showed that a typical full-time nursery place for a child under 2 in 2007 was £152 a week (up from £144 in 2006). Costs were highest in London and the South East of England (Daycare Trust, 2007).

Recent changes (in 2007) have extended maternity leave to twelve months (with statutory maternity pay for nine months). Whilst Department of Health guidelines on breastfeeding⁴³ need to be considered, alongside health and well-being implications for both mother and child, the current conceptualisation supports traditional parental stereotypes and notions of caring. Offering parents 52 weeks' of maternity leave (some of which is paid), with two weeks' paid of paternity leave suggests a wish for mothers to be the primary carers of children in their first year.

The emphasis on mothers potentially marginalises the role of fathers (Kilkey, 2006). Evidence suggests that more fathers want to play a greater role in their children's lives (EOC, 2003; O'Brien, 2005). The Government cite this research throughout their documents. For many fathers a conflict of responsibilities emerges between 'providing' and 'being involved' (Warin, 1999, p41); but the current conceptualisation of work-life balance (or family-friendly policies) in the UK does not necessarily recognise the shifts in fathering. The current gender pay gap encourages more fathers to stay in paid employment and mothers to work part time, due to financial penalties. The UK Government's determination to retain the 'opt-out' clause in the European Working Time Directive, will seemingly perpetuate long working hours for fathers and part-time work for mothers (Fagan, Hegewisch et al., 2006). The opt-out – where 'workers are still able to opt out of the weekly working time limits' (BERR, 2007e) – is a controversial measure, which the Government argues is a key mechanism to preserve labour market flexibility, offering choice for individuals as well as for employers (DTI, 2004d). It has been the subject of consultation (see DTI, 2004e), and remains a constant point of disagreement between trade unions and business lobbies. The 'flexibility' that the opt-out offers arguably sustains a key feature of the labour market in the UK – a one and a half breadwinner model – of men with partners and dependent/s being more likely to work

⁴³ The Government supports the promotion of breastfeeding as the best form of nutrition for babies. In accordance with WHO guidelines, six months of exclusive breastfeeding is recommended (DoH, 2006).

long hours and their partners part time (e.g. Hogarth, Hasluck et al., 2001; Houston and Waumsley, 2003).

The introduction of paternity leave in 2003 giving fathers the opportunity to take up to two weeks' statutory paid leave was certainly welcomed. Evaluation thus far has been mixed. In an employer survey, it was reported that 29 per cent of workplaces had experienced fathers taking paternity leave in the last two years, which in most cases was one employee (Hayward, Fong et al., 2007). Paid paternity leave has meant that fathers are taking more time off around the birth of their children than previously (Smeaton and Marsh, 2006); but many rely on annual leave or occupational terms and conditions rather than statutory paternity pay (Carvel, 2006). In a third of workplaces, annual leave was taken instead of statutory paternity leave (Hayward, Fong et al., 2007). Again, characteristics such as employment status contribute to fathers' decisions. Low-earning fathers (earning less than £1000 per month) and unskilled fathers were likely to take the least amount of leave, whilst those in unionised, large organisations or the public sector were more likely to take their full entitlement or more (Smeaton and Marsh, 2006). These differences in take-up can be linked to the low rate of pay associated with paternity leave (currently £112.75 per week and leave has to be taken in two-weekly blocks or as two consecutive weeks), which currently poses a significant barrier to many new fathers who may not be able to afford the loss of income at such a crucial time (Kilkey, 2006; O'Brien, 2005). In 2007, just under one in five workplaces offered more than the statutory paternity leave and / or pay, with the public sector being more likely to do so compared to the private sector (Hayward, Fong et al., 2007).

The UK was the last EU member state to adopt parental leave. Introduced in 1999, parental leave gives parents an entitlement to 13 weeks' of unpaid leave until their child is five, or 18 weeks' of parental leave until their child is eighteen if the child is in receipt of Disability Living Allowance. This represents the statutory minimum. Deven and Moss

(2002) argued that the UK Government was ambivalent towards introducing parental leave. This could perhaps be a result of pressure from business lobbies. The preference towards extending maternity leave (as outlined in consultation documents and enacted in legislation) rather than extending parental leave 'confuses maternity and parental leave' (Deven and Moss, 2002, p241). Maternity leave is gender specific and the primary concern should be the health and well-being of the mother and child; anything beyond that should be 'equally available to mothers and fathers' (Deven and Moss, 2002). The *Third Work-Life Balance Survey* illustrated that a very small number of parents (who were eligible) took up parental leave, equating to one per cent of all employees, or six per cent of all parents (Hooker, Neathey et al., 2007). Other research shows that parental leave was most commonly used by mothers to extend their maternity leave (Smeaton and Marsh, 2006). As pay is a primary factor in decision-making, it is the lack of associated pay that reduces take-up of parental leave.

The reluctance of the Government to introduce entitlements that are exclusively for fathers will continue to perpetuate gender inequalities in caring for children. In response to *Work and Families*, the EOC argued that increasing maternity leave to nine months with the intention to extend it to a year 'substantially increases gender differentials between mothers and fathers during the first year of the baby's life' (EOC, 2005b, p6). In this configuration, mothers would unquestionably remain the primary carer. This extension also detracts from parents making 'choices'. But this is not the route that the UK Government has pursued. In response to proposals to have transferable maternity leave, many issues emerged. For example, Kilkey (2006) suggests that couples will perhaps 'play it safe' and use twelve months as maternity leave. There is also no mention of the rights of partners of women who are not in employment when they are pregnant. The TUC estimate that 42 per cent of women are not in paid employment when they are pregnant – meaning that their partners would not be eligible for transferable leave (TUC, 2005b). The EOC proposed in their response to the

Government's consultation document that a 'shared parental leave' would provide more genuine options to parents and include parents whose partners are not working during pregnancy and who may want to work after a period of maternity leave (EOC, 2005b).

The idea of a shared parental leave brings UK policy initiatives more in line with progressive approaches internationally. For example, in other countries such as Sweden parents make choices about how they divide an extended parental leave (after a shorter statutory maternity leave period) and a 'daddy quota' is forfeited if not taken. Take-up is high, although not necessarily beyond the 'daddy quota', with characteristics such as employment status, educational levels and both parents' satisfaction with and attachment to work being important indicators of take-up. Fathers with higher education levels or whose partners have high levels of education and salary are more likely to take leave beyond the allocated time for fathers (Brandth and Kvande, 2006b; Haas, Chronholm et al., 2006). In Iceland, changes in legislation in 2000 created three blocks of leave: three months' non-transferable maternity leave; three months' non-transferable paternity leave; and three months' for parents to decide. This has significantly increased the amount of time that fathers take, and has had an impact on how the joint rights are divided, with fathers taking a third of parental entitlement overall (Einarsdottir and Petursdottir, 2006). While the UK continues to imply that the mother is the primary carer and the father is 'helping' rather than sharing caring responsibilities (O'Brien, 2005), choice remains constrained for many families.

A 'shared parental leave' and / or a 'daddy quota' could also progress gender equality aims (EOC, 2005b; TUC, 2005b; Working Families, 2005).

'The introduction of paid, shared parental leave would send a more appropriate cultural signal to wider society that the child is the responsibility of both parents. Take-up would be further enhanced if there were flexibility, in the longer term, to use shared parental leave over the first five years, and as reduced hours rather than as a single block of leave' (EOC, 2005b, p7).

Although many factors need to be balanced – such as the health and well-being of the mother and baby, cognitive development, childcare arrangements – there are options available to the UK Government to provide more genuine choices to parents to care and work.

Parental ‘choice’, has been a critical component of the Government’s work-life balance agenda. A recurrent theme is that parents are the best people to make choices for their children and that the Government’s role is to support and facilitate families ‘to ensure they have meaningful choices about how they live their lives’ (DTI, 2005d, p5). Parents want choices about how to combine work and family responsibilities in ways that work best for them.

There seem to be mixed messages about choices and particularly the choice to care. For mothers, on the one hand, long maternity leave seems to value mothers as carers, whilst also seemingly supporting goals of children’s cognitive development. But on the other hand, paid work is seen as the best way to ensure that children are not living in poverty and is strongly emphasised by the Government with links to the benefit system. For fathers, arguably a breadwinning role is assumed, by offering short (and low-paid) paternity leave, with no genuine proposals to provide fathers with independent rights.

Choices can be limited by different factors such as access to information, attitudes, resources and available opportunities; and choices may be constrained and not evenly distributed. The Government acknowledges some of the inequities in exercising choice specifically in relation to low-income families, and as a result have increased services such as childcare provision (for example through Sure Start – a government programme that aims to give children the best start in life).

‘Supporting low-income parents is particularly important. Low-skilled workers and their families are particularly at risk of parental and family stress, because their earnings are lower and they tend to have less choice over how they

balance their work and family responsibilities' (HM Treasury and DTI, 2003, p13).

But that same sensitivity to inequitable choices is not applied consistently, and as a result may often constrain choices for parents rather than enabling them. Different families will make different choices based on different criteria such as parental attitudes, employment attitudes, level of educational qualifications and attitudes to child development. For example, many women 'choose' to work part time (Booth and Frank, 2005). But part-time working is often associated with a significant gender pay gap, vulnerability and career penalties (e.g. EOC, 2006b; Manning, Petrongolo et al., 2004; Rake, 2000). In addition, fathers often work very long hours. With the UK Government's commitment to the 'opt-out' clause of the European Working Time Directive, that allows people to 'choose' to work over 48 hours a week, the long hours culture that is pervasive in the UK is likely to continue. In 2005, a reported 3.6 million employees – many of whom were fathers – regularly worked in excess of 48 hours per week, and 4.7 million employees worked (on average) an extra day a week in unpaid overtime (Fagan, Hegewisch et al., 2006). O'Brien (2005, p22-3) argued that although mothers and fathers all wanted more flexibility:

'fathers were more likely to want flexibility of working hours over the day and week without reduction in salary. By contrast, mothers' preferred flexible working arrangements entailed greater reductions in discrete chunks of working time, perhaps linking with children's requirements, with the inevitable drop in pay'.

This again suggests that a broader conceptualisation of flexibility is required.

While there exists a wide literature on parental choices, constraints and preferences (e.g. Crompton and Harris, 1998; Fagan, 2001; Hakim, 1996; 2000; McRae, 2003), the disparity in working hours creates a gender time gap that exacerbates inequalities related to pay, career progression and caring. Lewis and Giullari (2005, p77-8) argue that: 'the nature of the choices women and men face and the pursuit of gender equality depend on the extent to which policies address the issue of care work as well as on the

position of women in the labour market'. A more complex and divergent rebalancing is required if genuine choices to support parents is a priority for the Government.

The Government promotes gender equality as an articulated goal when discussing the rationale for increasing provision for fathers. It suggests that fathers should not be ignored in care and ties men's caring role to enhancing women's labour market participation and gender equality.

'Supporting greater participation of men in family responsibilities is important to the objective of gender equality, and as important as increasing women's ability to participate in the labour market. Mothers still bear a disproportionate burden of caring responsibilities compared to fathers, even when both are in full-time employment ...' (HM Treasury and DTI, 2003, p14)

'In moving towards the Government's goal of 12 months' paid maternity leave by the end of the next Parliament, we will introduce a new law to enable mothers to transfer a proportion of their maternity leave and pay to fathers. This law will help give children the best start in life and provide parents with more choice by allowing the mother the option of returning to work earlier if she wants to and responding to the growing demands from fathers to stay at home and care for their child. This reflects changing family patterns, the different choices families are increasingly facing, and helps support greater equality at home and at work for men and women.' (DTI, 2005d, p49)

Indeed, strengthening rights for fathers would support gender equality aims more broadly, but the proposed legislation of transferring maternity leave does not reflect that aspiration adequately, nor does it provide genuine choice for parents to make decisions around the time of their child's birth / adoption. Current working patterns and hours constrain choices further. With the emphasis on paid employment, the choice to care or engage in unpaid work is marginalised. But there are also mixed messages from the Government; whilst supporting labour market participation, there is also evidence of support for traditional gender roles. 'Choice' is often presented in policy documents without recognition of the constraints that different men and women face (Bennett, 2002). This lack of awareness is evident in government documents that support giving parents more choice. The constraints of part-time working and long working hours – although recognised – are rarely linked directly to the progress of gender equality.

4.4.2 Beyond parents: *The right to request flexible working*

The right to request flexible working was introduced in 2003, providing parents with children under 6 (or children under 18 if they receive Disability Living Allowance) the opportunity to request to work flexibly and obliging employers to consider it. In April 2007, this right was extended to adult carers, who can now also request the right to work flexibly, acknowledging the difficulties that adult carers experience in balancing their work and caring commitments. Currently over six million workers are eligible to request flexible working (2.65 million carers and 3.6 parents with children under 6 or with a disabled child under 18) (Taylor and Eaglesham, 2007). In November 2007, the Government announced its intention to consult on extending the 'right to request' to all employees, acting on calls from the Children's Minister Beverly Hughes, who amongst others has called for the right to be extended to all employees (Hughes and Cooke, 2007; TUC, 2005b; Working Families, 2005). The other main opposition parties also support its extension (to varying degrees) meaning that it is likely to remain on the agenda. The Conservatives have called for the right to request to be extended to all parents with children under 18 and the Liberal Democrats also support extending the right to request further (Eaglesham, 2007). 1.4 million extra parents would benefit from extending the right to parents of children aged up to the age of nine, and an additional 4.5 million parents could benefit if the age limit was extended to seventeen (Taylor and Eaglesham, 2007). Business lobbies such as the CBI have cautioned against extending the right too quickly, suggesting a phased extension to ensure that there is not an unsustainable deluge of requests (Taylor, 2007). The right to request flexible working is a key component of the Government's work-life balance agenda and the fact that it has been until recently the preserve of parents with young children is indicative again of the tension between providing opportunities for everyone and supporting parents in particular. In addition it raises questions about the entitlements of employees who are not parents. How far it will be extended will be significant in defining the next stages in the work-life balance agenda.

Research on the success of the 'right to request' thus far is inconclusive. Much of the available data do not indicate whether requests were made under the 'right to request' or were more general requests for flexible working. The available data do illustrate a variety in awareness levels and take-up rates. For example, the TUC's *Challenging Times* report found that hundreds of thousands of people have had requests for shorter hours turned down, despite almost one in 10 employees in the UK (2.3 million people) wanting to work fewer hours (TUC, 2005a). A smaller survey based largely on anecdotal evidence reported that of those who had asked to work flexibly, 43 per cent of employees had their requests accepted, 25 per cent accepted with changes and 32 per cent had their requests rejected (TUC and Working Families, 2004). Government-sponsored research presents a more positive picture. Fitzner and Grainger (2007) found that 17 per cent of employees had made a request to reduce their working hours (with 17 per cent of these requests being rejected). This sits alongside employer data stating that 92 per cent of employers would consider requests for any employee and that in 2007 employers turned down nine per cent of employees' requests (Hayward, Fong et al., 2007). It is not known however, how many employees have had informal requests rejected, or do not make a request from fear that their job may be endangered. This mix of data provide a somewhat blurred picture of the success of the right to request flexible working

What is common in the research is the documented gender imbalance in awareness, requests and take-up. Mothers are more aware of the right to request flexible working, asking for it and having their requests accepted at a higher rate compared to fathers, and women (22 per cent) were more likely than men (14 per cent) to request to work flexibly (Fitzner and Grainger, 2007; Hooker, Neathey et al., 2007). Employers rejected 23 per cent of requests made by men and 13 per cent made by women (Hooker, Neathey et al., 2007), with men in the private sector least likely to have their requests accepted (Fitzner and Grainger, 2007). This suggests that mothers are making more requests than fathers

and having more of their requests accepted. These discrepancies can perhaps be explained by 'balancing' being congruent to women's roles (Lewis, 1997). Lewis (1997) and Lewis and Haas (2005) argue that staff need to feel a 'sense of entitlement' to request benefits and perks in the workplace. A 'sense of entitlement' is based on what is a fair and legitimate expectation and men and women have different senses of this. Men are considered to have a stronger sense of entitlement towards pay, and women have a stronger sense of entitlement to the hours they work, seemingly more able to ask for time off to care (Lewis and Haas, 2005). The argument is based on prevailing gender norms resonating in the workplace. This construction of entitlements contributes to explaining the higher rates of women's utilisation of work-life balance policies compared to men. It also emerged as an issue through the organisational case studies (Chapter 6).

As is the case with part-time working, questions arise about the quality of jobs and career prospects for those who have requested to work flexibly. A high proportion of women use this 'right' leading to questions about whether it contributes to a 'mommy track', and if so whether there are implications. Coined in the US in the 1980s, a 'mommy track' is considered to be a specific route for mothers where organisations 'park' mothers who no longer work full time (Lundstrom, 1999). Jobs are often characterised as being dead end jobs, with few routes to progress, and often perceived to be inferior jobs (Ehrlich, 1989; Schwartz, 1989). There are no available data to indicate whether the right to request flexible working has led to the perpetuation of the 'mommy track'. Research on part-time working highlights different pay penalties associated with motherhood and downward career trajectory (e.g. Manning, Petrongolo et al., 2004; Rake, 2000). This is not a good predictor for the 'right to request'. However, there are anecdotal examples in organisations of parents working under the 'right to request', reportedly with the same job and levels of satisfaction (e.g. The Times, 2007).

The right to request flexible working was initially proposed as a 'right to flexible working' rather than a 'right to request flexible working'. The downgrading of the 'right to flexible working' to a 'right to request' highlights the influential role of business (Kilkey, 2006).

The influence of the business lobby will again be a critical factor in defining the boundaries of how the 'right to request' is extended. The Confederation of British Industry (CBI), which represents a large cross-section of businesses and business interests, has already warned the Government about the dangers of extending the right to request flexible working too quickly to parents of older children so as to not jeopardise flexibility for those currently eligible (CBI, 2007). This may imply that businesses see a limited number of jobs as flexible and may be worried about legislation mandating that they accommodate an increasing number of requests.

Analysing current provision of the right to request flexible working and proposals to extend it raises some interesting questions. The extent to which the work-life balance agenda will be extended perhaps highlights the critical tension in work-life balance provision; should work-life balance policies be targeted or universal? As demonstrated in the analysis above, it seems as though the rhetoric is universal, and the reality is targeted. Perhaps a way to resolve this tension is to categorise different types of provision, so that leaves could be targeted to parents and carers whereas working time flexibility could be for everyone. Whilst this may not mitigate backlash and resentment in the workplace, it does offer a potential way to begin to unpack conflicting priorities in the workplace within a practical policy framework.

4.4.3 Work-life balance: Employers and the business case

As already discussed, the term work-life balance – as well as indicating a broader agenda for everyone – was the term that the Government adopted to appeal to employers. Similar to the 'managing diversity' discourse (in Chapter 2), the business case underpins work-life balance policies. To reiterate, the business case rests on

arguments that respond to changing demographic and employment patterns, and in particular the rise in women's employment rates (Employers for work-life balance, 2004). The advantages associated with the business case are similar to those articulated to be effective of a diversity approach (Jones, 2006). In a brochure aimed at employers to encourage more widespread use of work-life balance policies, the DTI outlined the business benefits of work-life balance as: motivating staff, saving on recruitment costs, reducing staff turnover, reducing absenteeism, attracting and retaining a talented workforce and improving customer service (DTI, 2004f).

Examples of 'best practice' case studies have been an instrument widely used to demonstrate the adaptability of work-life balance policies in all types of organisations. In a DTI publication identifying fifty best practice case studies (DTI, 2003), the business benefits to be derived from introducing creative work-life balance policies were encouraged to bring benefits to businesses and its employees for all sized businesses. The themes of enhancing productivity and promoting enterprise were also prominent.

Much data have been published on the success of work-life balance policies. The DTI has sponsored research on awareness, opportunities and take-up from employer and employee perspectives (Hogarth, Hasluck et al., 2001; Hooker, Neathey et al., 2007; Woodland, Simmonds et al., 2003). Most of the research on work-life balance is focused on policies related to flexibility of working time and place, and leave entitlements. In 2007, 95 per cent of workplaces offered at least one of part-time working, job sharing, flexi-time, compressed hours, reduced hours and working from home, signalling an increase since 2003 (88 per cent) (Hayward, Fong et al., 2007). According to survey data commissioned by the government (Table 4.2), there has generally been a reported increase in utilisation rates of work-life balance policies that focus on temporal flexibility. Despite part-time working being important to work-life balance, its availability in organisations does not necessarily suggest a family-friendly management strategy

(Whitehouse, Haynes et al., 2007). As has already been discussed, part-time working is often used as a mechanism by employers to regulate work flow and respond to their needs. It is important to note, however, that the introduction of the right to request flexible working in 2003 may explain some of the increase in part-time working.

Table 4.2: Trends in the availability of flexible working arrangements amongst all employees in the first work-life balance study (WLB1) published in 2000; the second work-life balance study (WLB2) published in 2003; and the third work-life balance study (WLB3) published in 2006

	WLB 1(2000)*	WLB 2 (2003)	WLB 3 (2006)
	(%)	(%)	(%)
Part-time working	49	67	69
Reduced hours for a limited period	56	62	54
Flexi-time	32	48	53
Job-share	46	41	47
Term-time working	22	32	37
Compressed working week	25	30	35
Annualised hours	17	20	24
Regular home working	n/a	20	23
One or more arrangements available	-	85	90
No flexible working arrangement available or don't know	-	15	10
Unweighted base	7561	2003	2081
* includes those answering: depends/probably. Data from: Hogarth, Hasluck et al. (2001); Stevens, Brown et al. (2004) Source: Hooker, Neathey et al. (2007, p61). Table 3.3			

Surveying the published literature on implementation, a gap is revealed between policies and implementation that is also raised in the case study organisations (Chapters 5 and 6). Table 4.2 shows trends in the availability of work-life balance policies for all employees and demonstrates that provision had increased recently. Table 4.3 illustrates the trends in take-up, showing that there has been a relatively small increase in take-up of work-life balance policies despite the increased provision. The case study organisations can be seen as relevant examples illustrating how organisations work towards implementing this agenda encouraged by the Government. As expected there are differences in organisations by size, sector and trade union representation.

Table 4.3: Trends in the take-up* of flexible working arrangements amongst all employees in the first work-life balance study (WLB1) published in 2000; the second work-life balance study (WLB2) published in 2003; and the third work-life balance study (WLB3) published in 2006			
	WLB 1(2000)	WLB 2 (2003)	WLB 3 (2006)
	(%)	(%)	(%)
Part-time working	24	28	27
Flexi-time	24	26	27
Reduced hours for a limited period	n/a	13	12
Regular home working	20^	11	10
Compressed working week	6	11	9
Annualised hours	2	6	8
Job-share	4	6	6
Term-time working	14	15	13
Not worked flexibly in the last 12 months	n/a	49	44
Currently working flexibly or has done in the last 12 months	n/a	51	56
Unweighted base	7561	2003	2081
* In WLB 2 and WLB 3, only those respondents who currently worked (or had worked) under a flexible working arrangement were asked about take-up. In WLB 1 all employees were asked. ^this question was asked differently making comparison unreliable in this case. Based on data from Hogarth, Hasluck et al. (2001); Stevens, Brown et al. (2004). Source: Hooker, Neathey et al. (2007, p62)			

The literature refers to an implementation gap between policy and practice. Some of the common explanations for this gap include variation in managerial support and perceptions of career progression consequences (McDonald, Brown et al., 2005). Gendered organisational culture and perceptions of gender also contribute to an implementation gap (Lewis and Haas, 2005). There are significant differences in the perception of access to part-time work. For example, female employees (82 per cent) are perceived as having greater access to part-time work compared to men (58 per cent); likewise public sector (79 per cent) compared to private sector employees (65 per cent) and employees in larger organisations⁴⁴ (73 per cent) compared to employees in small organisations⁴⁵ (67 per cent) (Hooker, Neathey et al., 2007). These perceptions have an impact on take-up. These factors that may limit take-up are discussed in further detail in the next two chapters in the context of the case studies.

⁴⁴ Large organisations in this context have 250 or more employees.
⁴⁵ Small organisations in this context have 5-24 employees.

4.5 Conclusion: A multi-dimensional work-life balance agenda

The business case for equality and diversity and the business case for work-life balance are similar. The Government publication entitled *The business case for equality and diversity* (DTI, 2004a) outlined the benefits of enhanced customer benefits and improved morale and productivity for the workforce, which were similar to the benefits outlined in the work-life balance campaign for employers (DfEE, Scotland Office et al., 2000). The cost of not allowing staff to balance their work and home responsibilities was outlined as detrimental to creating and sustaining a competitive edge. As a result, work-life balance policies have been located in a 'managing diversity' framework.

Through analysing the definitions of work-life balance, it is clear that the term 'work-life balance' is used to express numerous objectives that include everyone having the opportunity to balance work with other parts of life, to flexible working, to family-friendly measures. In this way, the possibility exists for work-life balance policies to be one of the mechanisms that address inequalities, but the reliance on the business case limits this potential.

The above analysis of the UK Government's work-life balance agenda has shown that in practice work-life balance policies prioritise mothers (often with a partner) and young children. Extending provision to carers of adults indicates some changes in approach,⁴⁶ as does extending maternity leave and offering transferable maternity leave. Whilst these developments seem progressive, without a substantial increase in maternity pay, an individual (similarly well-paid) right to paternity leave, and paid parental leave (with careful consideration of a 'daddy quota'), it seems unlikely that they will make a fundamental difference. Choices for parents will be constrained and gendered stereotypes and expectations of mothers and fathers are likely to remain.

⁴⁶ The right to request flexible working was extended to cover carers of adults in April 2007.

The examples of maternity, paternity and parental leave as well as the right to request flexible working raise many issues and concerns in the way that the Government conceptualises work-life balance policies and as a result how they are implemented. The intersection between working hours and flexibility is obviously critical and has a significant impact on gender outcomes for both men and women. The notion of choice and what it really means in terms of being able to make decisions has been highlighted as being limited. Finally, the implementation gap between what the Government proposes and encourages, and how organisations implement policies, has been raised. Chapters 5 and 6 present case study data and draw on the evidence presented in this chapter (as well as Chapter 2) to consider how organisations conceptualise and implement their work-life balance agenda. Many of the tensions outlined through this chapter feature in the case study organisations.

5.0 EQUALITY AND DIVERSITY: EXPLORING MEANINGS IN ORGANISATIONS

5.1 Introduction

In practice as well as in theory, there has been a growing tendency to frame equal opportunities in the context of diversity (Mason, 2002). This chapter analyses how equality and diversity are conceptualised and implemented in organisations and discusses the implications for gender equality. It suggests that the theoretical scope to progress gender equality through diversity – as offered in the feminist literature (identified in Chapter 2) – is not reflected in practice, constraining the potential that an equality agenda has in an organisation in its ability to progress gender equality.

Through the analysis of selected case study organisations, this chapter explores the meanings of equality and diversity. Reflecting wider trends, the case study organisations had extended their equality remits to comply with legislative requirements, and had adopted the language of a ‘managing diversity’ approach. With the emphasis on the business case, it seems as though a diversity approach is limited in its potential to overcome the same-difference (gender) dichotomy. Diversity approaches are further limited in shaping policies to address intersecting inequalities. This research shows that a diversity approach does not seem to be able to genuinely challenge the organisational culture. As work-life balance policies in these organisations were positioned within an equalities framework, the way that equality and diversity were conceptualised and implemented is critical to understanding the gender dimensions of work-life balance policies (Chapter 6).

The chapter begins with profiling the case study organisations’ workforces. The workforce profiles illustrate that women are concentrated in the lower and middle ranks and that men dominate the senior grades in each of the participating case study organisations; and that part-time work is disproportionately female. The equalities agenda is actively promoted, but is somewhat disconnected from these gender

disparities. This research clearly demonstrates that diversity is part of the equality framework. Each of the case studies had actively implemented a 'diversity' framework in preference to 'equal opportunities' for the perceived positive, dynamic and progressive opportunities it offered. The 'empty shell hypothesis' (Hoque and Noon, 2004) is generally supported, in that policies have not changed substantially, other than to reflect legislative requirements. The language of diversity along with the emphasis on the individual has become more pervasive.

In defining diversity, all the case study organisations had difficulty in devising and implementing policies that could address disparate equality goals. The aims of the equality agenda were explicitly tied to the business case. The rights, responsibilities and contribution of the individual were discussed at length. The responsibilities and opportunities for each individual employee were largely disconnected from the gender disparities evident in each of the organisations. Equality aspirations and statements included goals such as: 'valuing everybody's individual contribution', 'creating an environment free from discrimination', 'ensuring equality of opportunity', and 'recognising the needs of a diverse workforce'. These aspirations reflect central ideas associated with a 'managing diversity' approach, for example, valuing individual contributions and celebrating differences (e.g. Kandola and Fullerton, 1998). These values also maintain a commitment to more traditional equal opportunities approaches.

The participating case study organisations embraced a sophisticated and progressive equality framework compared to other organisations. 'Managing diversity' had introduced a new language and had broadened the equality agenda. But, these organisations were not able to articulate an agenda that would genuinely progress equality – gender or otherwise. Despite significant progress, these organisations seemed unable to recognise organisational barriers that reinforced gender inequalities.

5.2 Case study approaches to equality and diversity

As outlined in Chapter 3, three organisational case studies were selected as part of this research: a Central Government Department (CGD), an Arm's-Length Management Organisation (ALMO) and a Financial Services Company (FSC). Based on data collected from documentary analysis⁴⁷ (e.g. equality, diversity, work-life balance policies and guidance and workforce data) as well as interviews⁴⁸, the following sections present information on the approach to equality within each organisation, current equality policies and workforce profiles.

In all three organisational case studies, provision exceeded statutory requirements. In all cases, diversity had become a prominent part of the equality framework. But there was evidence to suggest that the definition and aims of equality were not clear to those involved; consequently, it was not a transformative diversity that resulted, but rather a more limited 'managing diversity' approach.

5.2.1 Central Government Department (CGD)

The CGD that participated in this research has had a long and at times difficult relationship with the equality and diversity agenda. In the 1990s the organisation faced criticism for being institutionally racist. This was not unique, as the Macpherson Report⁴⁹ labelled another public sector organisation as 'institutionally racist' (Podro, 2006). The attempt to rid itself of this label has defined much of the organisation's subsequent approach towards equality. This CGD is now seen as a leader in equality and diversity. However, given this history, race and ethnicity provide much of the impetus for the organisation's approach to equality. This is not dissimilar to other government

⁴⁷ There was significantly more published data available at the CGD compared with the ALMO and FSC.

⁴⁸ A summary of the interviews conducted is in Appendix D.

⁴⁹ The Macpherson Report was published following an inquiry into the matters arising from the death of Stephen Lawrence – a black teenager who was stabbed in London in 1993. It was published in 1999 and is seen as a defining point in race relations for the UK in that it branded the Metropolitan police 'institutionally racist' and recommended a range of changes to improve race relations.

departments. Exploring the place of gender was challenging, given this legacy and context.

Throughout the organisation's literature, a strategic approach towards equality and diversity was evident, with a specific unit dedicated to working on equality and diversity (both service delivery and workforce issues). The organisation's equality and diversity policy was comprehensive, outlining aims, commitments, potential benefits and delivery mechanisms as well as organisational responsibility (CGD, 2005c, p2). The overall aim of the equality and diversity strategy was presented as:

'Improving on equality and diversity – and by this we mean treating people fairly, providing equal chances while respecting people's differences – is an important test of our overall modernisation ... It is also at the heart of attracting and keeping a high-quality workforce that reflects modern Britain' (CGD, 2005d, p1).

Similar sentiments are echoed by other central government departments. Whereas equality is about legislative compliance and groups; diversity is about all sorts of differences, and the individual. For example, the Department for Environment, Food and Rural Affairs (DEFRA) outlines its commitment:

'Equality laws apply which we must continue to observe. They, and our policy of equality of opportunity, remain central to our approach. In Defra, our equal opportunity policy is to create an environment free from harassment, bullying or discrimination, direct or indirect on grounds such as race, ethnic origin, sex, marital status, disability, sexual orientation, religious beliefs or age ...

Acting to improve the position of those groups who are under-represented in management grades and specialisms (women, people from ethnic minorities and people with disabilities) is fundamental to the achievement of our Diversity aim.

But diversity goes wider than this:

- *it is about all sorts of differences, not just those covered by our equality policy, such as working pattern and social background;*
 - *it focuses on individuals, not groups of people;*
 - *it means actively drawing in and using different perspectives and skill'*
- (DEFRA, 2007)*

This type of commitment immediately poses a challenge to the organisation of how it will provide equal chances as well as respect people's differences. How do you prioritise different types of 'diversity'? What happens when individuals' differences are in tension? What is the relationship between individuals and group characteristics? And is the

capabilities approach encouraged by the EHRC able to reconcile some of these contradictions (Chapter 2)? Alongside commitments of 'providing equal chances while respecting people's differences', the CGD also has 'Programmes for Action on Women, Race and Disability', which aim to achieve 'equality of opportunity for women, ethnic minorities and people with disabilities' (HR Team - CGD, 2004, p1). These Programmes for Action are a more active approach, with specific focus and guidance for employees in terms of aiding recruitment, and retaining and promoting staff. They recognise shortcomings in the organisation related to workforce representation. But they are framed within the business case, with an emphasis on recruitment and retention.

More specific to this organisation than others in this research has been the place of race compared to other strands of equality. Driven by the Race Relations Act (RRA) and public criticisms of discrimination, race became the key focus of equality. Annual reports as well as some of the interviewees commented on this. This CGD was a slow beginner in relation to equality and diversity issues, but more recently it has demonstrated a considered strategic agenda with measurable outputs that are reported in annual reports. The emphasis on racial equality again raises questions, and suggests that a hierarchy prioritising race may have been established (e.g. Waddington and Bell, 2001). This emerged as a general issue within diversity strategies (in Chapter 2). While it may be right for race to be prioritised given the organisational context, the organisation's commitment to equality and diversity and the proposed single equality scheme (discussed below) suggest that this perhaps is an unintended outcome. Although there has been debate about the effectiveness and success of the RRA, it has mandated that race equality be considered in public sector organisations. The recent introduction of a Gender Equality Duty in April 2007, is analogous to the RRA in that it requires all public authorities to demonstrate their commitment to promoting equality for women and men. It has the potential to provide a minimum standard of compliance that can change how organisations will approach gender equality; but it is too early to assess its impact.

This CGD prides itself on the progress that it has made in applying 'diversity'. It presents a comprehensive and considered agenda, but at times is ambiguous. For example, the Annual Employment Equalities Report (2003-04) begins with the statement that the organisation 'has made excellent progress across a wide range of diversity indicators' (CGD, 2005a, p4). The report does not explicitly outline the composition of its diversity indicators, but implies that they are targets for key demographic groups (i.e. on gender, ethnicity and disability) and based on representation across pay bands. The CGD believes that it has established a positive reputation in relation to equality and diversity and is committed to 'taking equality and diversity into its next phase ... moving from agenda setting to focus on results and outcomes' (EDU, 2004, p3).

5.2.2 Arm's-Length Management Organisation (ALMO)

This organisation became an ALMO in 2004. Prior to that, it was the housing department of a local authority. Although the organisation is owned by the Council, it operates as a separate entity (at 'arm's-length'). In this case it has responsibility for rented and leasehold stock. The ALMO provides a range of housing management services that includes income collection, repairs and facilitating resident participation. The concept of an ALMO was first raised by the Government in its housing Green Paper, *Quality and Choice: A Decent Home for All* (DETR, 2000). The ALMO sector continues to grow, with the first five funding rounds having allocated £2.8 billion and established forty ALMOs between 2002 and 2007. The Government's expectation is that alongside local authorities, ALMOs will achieve the Decent Homes Standard for their housing stock by 2010 (Audit Commission, 2007a).

The Audit Commission inspects ALMOs based on numerous criteria that include corporate culture and governance, access and customer care, service user involvement, partnerships, and harassment and domestic violence (Audit Commission, 2007b).

ALMOs must receive a minimum two-star rating before additional funds can be unlocked (NFA, 2007). The achievement of a three-star rating creates the potential to secure even more funding. For example Stockport Homes has received over £40 million in additional funding for the next two years, with the potential for an additional £60 million for 2008-2010 based on the achievement of a three-star rating.

The positioning of this case study organisation as an ALMO has provided scope to enhance performance and develop policy in areas where it is perceived that the local council framework had failed. The ALMO had inherited its equality structure from the local authority, and issues such as effective communication and creating a cohesive framework had already been identified as areas for improvement. At the time of analysis, the ALMO was immersed in further clarifying these policy objectives.⁵⁰ Like the CGD, the same tension was immediately identified in their equality and diversity policies – trapped between promoting equality of opportunity and celebrating difference; whilst policies generally conformed to compliance with legislation, which as discussed in Chapter 2 is largely based on conceptions of equal treatment.

At various points in the ALMO's literature, it was clear that part of the rationale that was driving the equality agenda was based on a commitment to provide 'dignity for all'. This extended outside the workplace, in that the aspiration was to improve the 'living and working environment'. But foundations of what type of equality and diversity the organisation was striving towards was lacking. Like the CGD, questions around what type of diversity the organisation aspired towards remained unanswered. The following excerpt highlights that equality and diversity are important and part of the organisation's agenda, but it does not explain what equality and / or diversity actually is:

'(The organisation) is committed to promoting equality and diversity among our customers and staff. Our equality and diversity policy links directly into our new equality and diversity strategy and action plan, which sets out our priorities for

⁵⁰ At the time of my research, the ALMO had employed an independent equality and diversity consultant to assist in defining and driving forward an equality and diversity strategy.

action to improve the living and working environment for all our (service users) and staff' (ALMO, 2005b, p3).

The ALMO had already developed a structure whereby procedures and templates to conduct impact assessments for all strands of equality were operational. Again, as a result of the RRA, race had been the central driver and then used as a template to extend provision. Being seen as a progressive organisation was further identified as a reason to extend impact assessments to all strands of equality.

Additionally, like the CGD, there were positive action schemes which promoted and encouraged groups who were under-represented particularly at senior levels: women, black and minority ethnic staff and disabled staff (ALMO, 2005b). The schemes outlined that their aims were to harness the potential and talent of individual employees, to assist them to develop the necessary confidence to progress, again representative of characteristics associated with a 'managing diversity' approach. In compliance with legal requirements, these positive action schemes stated very clearly that they did not provide preferential status for jobs.

5.2.3 Financial Services Company (FSC)

The FSC did not have much published information on policies and on its workforce compared to the CGD and ALMO. Data were supplied largely in response to the questionnaire and its distribution was carefully supervised by the main contact for my research. Financial services organisations have generally been at the forefront of the private sector in pursuing equality goals (Shaw and Perrons, 1995). This could be because traditionally high numbers of women have been employed in this sector. Since the 1960s, women have comprised the majority of bank employees, but the grade, structure and tasks they were expected to perform were different from those assigned to men (Halford, Savage et al., 1997). Tasks were stereotypically 'female' tasks of secretarial work such as typing and cashier work. However, the Sex Discrimination Act

and Equal Pay Act in the 1970s forced banks to review their organisational structure. In addition restructuring in the 1980s as a result of broader economic and technological changes created 'a mass of routine, low-level clerical occupations' (Crompton, 1989, p143); and a new sales culture emerged, affecting the way that banks operated (Halford, Savage et al., 1997). Other changes such as the prevalence of tele-banking and internet banking have contributed to more changes in the financial services sector and potentially redefine the understanding of a career in financial services. It seems that corporate citizenship motivations and retaining talent strongly underpin an enhanced equality agenda (G2 Special, 2007).

The FSC in this research had an equal opportunities policy which aspired to ensure that employees and job applicants received equal treatment and were not discriminated against. It outlined protection for a wide range of groups (far exceeding statutory requirements) to include: colour, race, sex, sexual orientation, age, disability, religion, political beliefs, trade union membership, marital status, nationality, pregnancy or maternity arrangements, and physical characteristics. This was indicative of an extended equality framework. The organisation did not often use the terms 'equality and diversity' because, as one respondent remarked, 'equality and diversity is not very friendly in an organisation where everyone knows each other' (*FSC – staff representative and manager*). But the dominant framework and policies within this organisation were consistent with a diversity approach, with a particular focus on recruitment and retention. In the 2006 Annual Report, maintaining employee morale at 65 per cent satisfaction level was documented as a Key Performance Indicator (KPI) for the company, alongside profit and customer service KPIs. The purpose for the organisation was 'to ensure it retains its best employees and generate a good level of morale in order to better serve its customers'. The most recent data that the FSC published illustrated that in 2006 employee satisfaction was 76 per cent (based on a 69 per cent response rate), an

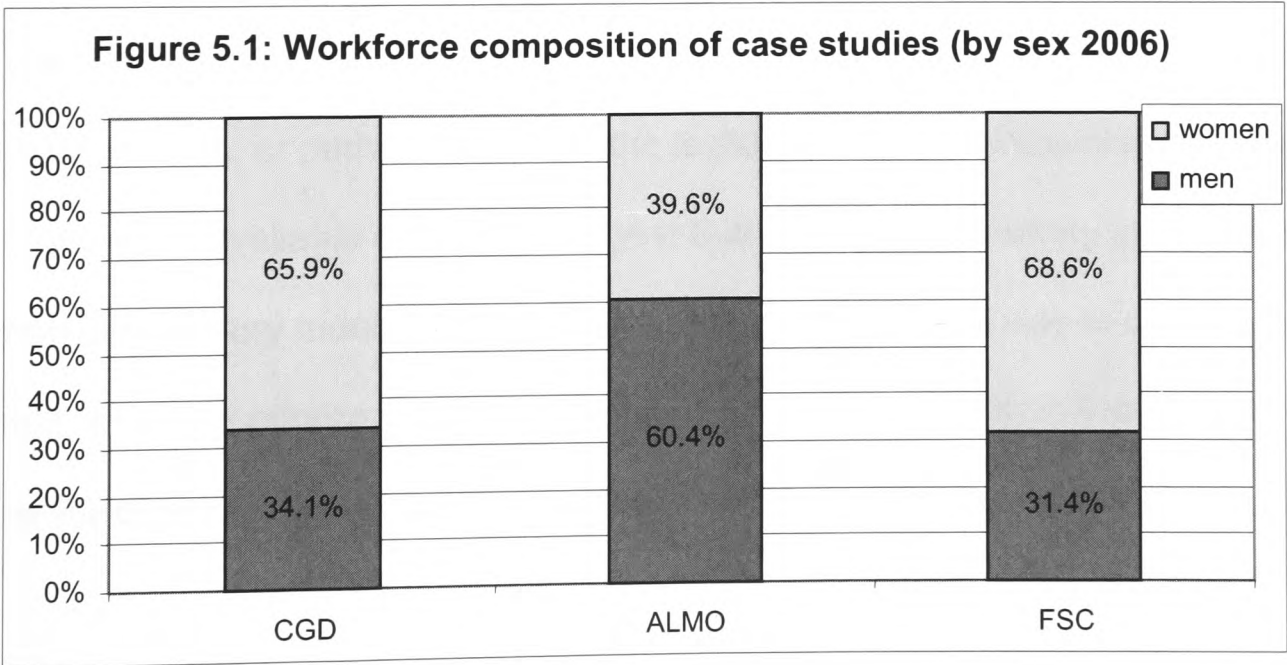
increase on 2005 when it was 70 per cent (FSC, 2006). Through this measure, the FSC stressed the business case for diversity as well as for work-life balance.

5.3 Case studies: Workforce profile

The same employer profile questionnaire (Appendix B) was given to each case study organisation, allowing for comparative data to be generated. This section presents some of that data in relation to the composition of the workforce. It illustrates the workforce profile for the organisations based on gender and other diversity strands (where available), data on working hours (by sex), and information on career progression. These descriptive data are used to demonstrate that there are gender disparities in the selected organisational case studies.

5.3.1 Workforce composition

The following explores the composition of the workforce in participating organisations, first by sex and then by other equality strands based on availability of data. The CGD employed over 8000 employees⁵¹, the ALMO 796 and the FSC 1006 employees. Figure 5.1 illustrates the workforce composition in each case study organisation by sex.



⁵¹ Data for the CGD was provided by several HR officers. The total number of employees slightly differs depending on the source.

Figure 5.1 is reflective of broader workforce data, given that in 69 per cent of financial services companies and 65 per cent of public administration organisations the percentage of female employees is over 50 per cent (Kersley, 2006). As discussed in Chapter 3, this particular ALMO is largely responsible for maintenance and repairs, meaning that it has a male dominated workforce, which is not usual for public sector / local government organisations. Despite this, the ALMO subscribes to a local government equality framework and most of its policies were inherited from the local authority, suggesting that many of its characteristics are (still) similar to other public sector organisations. The proportion of female employees in an organisation is associated with an increased likelihood of having an equality policy (although causality is difficult to determine) (Kersley, 2006). It is therefore to be expected that the case study organisations would proactively be committed to equality.

Case study organisations were asked about aspects of workforce data that related to equality. The availability and quality of data varied considerably across the participating organisations. With the exception of the CGD, not much data were collected. Whilst all the organisations had data related to equality, data on equality strands such as ethnicity and disability were less accessible. There were no available data in any organisation on sexual orientation or religion and belief, perhaps because it was considered too sensitive to collect these data, or perhaps because the legislation is still relatively new (enacted in 2003). The lack of available data may suggest that relying on voluntary good practice rather than compulsory monitoring may not be the most effective way to collect data. If monitoring is to be a priority for organisations, then perhaps a statutory duty to monitor (Dex and Purdam, 2005) needs to be seriously considered by the Government.

The workforce profile information that was supplied by the participating organisations did represent an attempt to monitor and evaluate equality and diversity. The lack of comprehensive data is an obvious limitation in pursuing a more considered equality and

diversity agenda. The following information is based on figures provided on ethnicity, disability and age. In addition, Programmes for Action and targets have been set to address under-representation (discussed below)

The ALMO identified 313 employees who were from non-white ethnic groups (151 men and 162 women), representing 39 per cent of their entire workforce. The ALMO is located in an area where there is a high proportion of black and minority ethnic (BME) residents and therefore this reflects the population. Census data from 2001 illustrate that approximately 75 per cent of the local population is 'white' with the rest from minority ethnic groups (National Statistics, 2007). Throughout the interviews, participants mentioned that despite these increasing numbers, under-representation particularly at senior levels was an issue for BME staff. Fifty-eight members (7.3 per cent) of staff across the organisation were registered as having a long-term disability. But there was no available data on payband level. There were no collated data available on these aspects from the FSC. Other research (e.g. Dex and Purdam, 2005) has commented on low levels of data collection, particularly in the private sector, due to a reliance on voluntary best practice rather than compulsory requirements. Despite diversity goals set by these organisations to promote equality and diversity for a variety of different groups, strategies and policies may remain ineffective unless a more comprehensive baseline understanding in the organisation is recognised.

Interestingly, all organisations collected some data on age. Although anti-discrimination legislation was only enacted in 2006, age is perhaps easier to monitor than some of the other diversity strands – particularly sexual orientation and religion and belief. It is not perceived to be as personal or sensitive. Age also has an explicit dimension of retention of knowledge and skills which is considered a key business benefit. Flexible working for older workers as a way to remain active in the labour market has also become topical in the context of pension provision (e.g. Pensions Commission, 2005), further increasing

awareness. Based on findings from a recent CIPD survey (CIPD, 2008), demand for flexible working beyond state retirement age is reported to soar. The CGD presented me with Figure 5.2 illustrating the age distribution of its workforce.

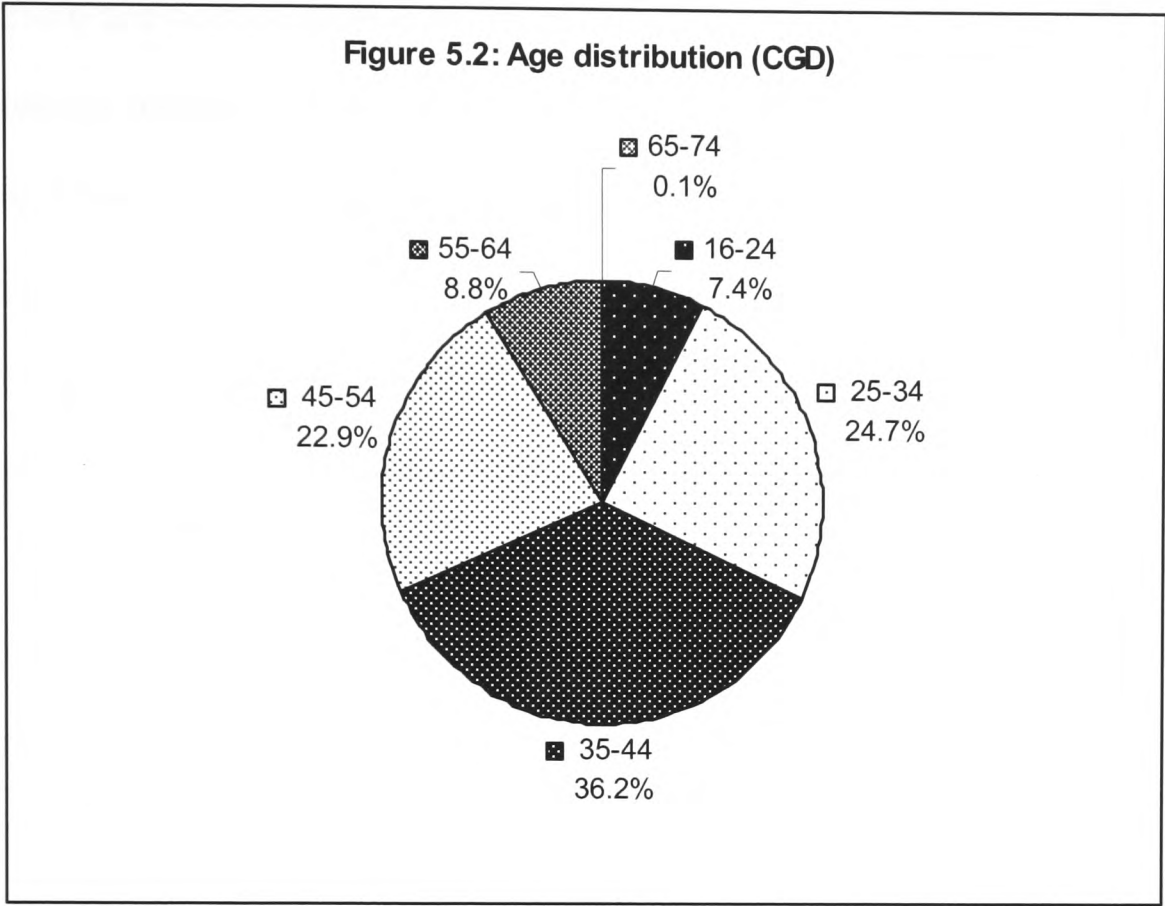


Figure 5.2 illustrates that 23 per cent of the CGD’s workforce was aged between 45 and 54, and nine per cent was over 55 years old. The ALMO employed 207 employees (26 per cent) who were over the age of 50 (155 male, 52 female), and the FSC employed 149 (15 per cent) employees who were aged 50 or above (82 women and 67 men). These numbers are likely to increase given recent legislation protecting people against discrimination based on age and an increasing awareness of flexible working options and flexible retirement possibilities for older workers (Chapter 1).

No data on union numbers were available from the organisations themselves. Union representatives at the ALMO estimated that about 600 employees were members of the GMB – which would indicate a membership rate of about 75 per cent in the organisation. The other active union in the ALMO, UNISON, estimated that about 25 per cent were UNISON members.⁵² The FSC did not have a recognised union. Its staff association

⁵² Several attempts were made to clarify these figures on union representation, as Kaur (2004) suggests that in 2003 53 per cent of public sector employees were union members suggesting that these figures may be indicative of the Council as a whole - but a response was not received.

represented all employees, with each representative responsible for a specific area on the floor or team. The CGD had a union representative who remained inaccessible, despite repeated attempts to contact them by phone, email and through the HR director. Therefore there are no available data on union representation. A number of special interest networks existed at the CGD, for example for ethnic minorities, disabled staff and lesbian, gay, bisexual and transgender (LGBT) staff. A network review particularly focused on resource allocation was under way at the time of the interviews. The findings had not yet been published by the CGD at the time of writing. Representatives from the ethnic minority and LGBT staff networks participated in this research.

Despite the vast array of groups that the organisations' policies intend to cover, and their commitments to diversity, there were no cross-sectional data available throughout the organisations. For example, although it was clear from workforce profile data and interviews that both women and black and minority ethnic (BME) employees were under-represented at senior levels, there was no indication of how many BME women / men were in senior positions. There were some indications from senior HR at the CGD that this was an area that they needed to respond to, as without it they were not adequately addressing key aspects of inequality.

These data demonstrate that there is a mismatch between the way that these organisations conceptualise equality and diversity – with aspirations of equality for all – and the reality of how equality and diversity are implemented. Equality and diversity strategies attempt to deliver a wide range of outcomes, but comprehensive monitoring data were not collected (see also Kersley, 2006), and the goals of the policies were not yet clarified.

5.3.2 Part-time working and gender

When analysing workforce composition by sex, and particularly looking at part-time work data, stark differences emerge. Figure 5.3 shows the percentage (by sex) of part-time and full-time employees for each case study organisation. Not surprisingly, in all the case study organisations, substantially more female employees work part time.

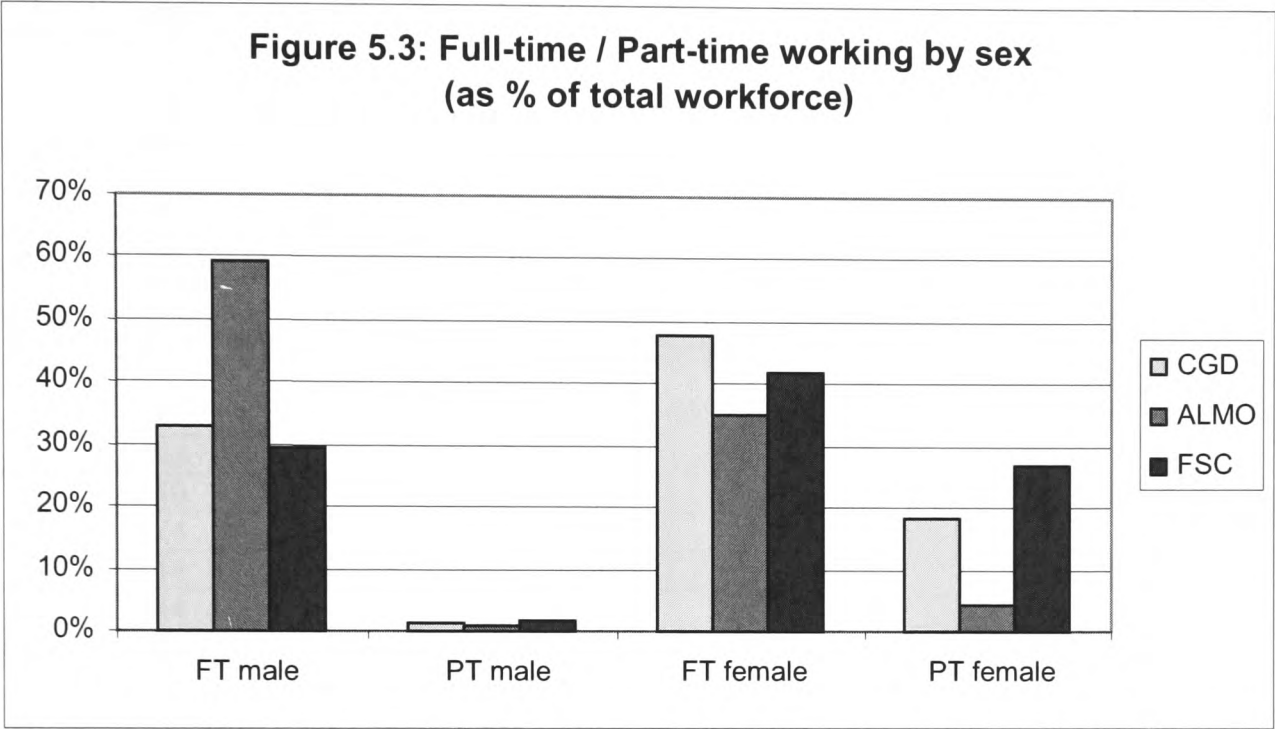


Figure 5.3 illustrates that the same general patterns were observed at all the case study organisations (even at the ALMO where there are fewer female employees). Interestingly, the FSC had the highest rates of part-time work rates for women, with a higher proportion of women in the public sector organisations working full time. This may be the result of more flexible work arrangements being more readily available in the public sector (discussed in further detail in Chapter 6). A comprehensive picture emerges when dissecting these figures further, to explore whether there are specific patterns for men and women, and also identifying at what levels of the organisation there were high levels of full-time or part-time work (Tables 5.1 – 5.3).⁵³

⁵³ For tables 5.1 (CGD) and 5.3 (FSC), seniority increases down the tables. Table 5.2 (ALMO) grades overlap with regard to seniority.

Table 5.1: Total payband (full time and part time) by sex – CGD										
	Male		Female		Total in payband		% of part-time in payband*			
							Male		Female	
	no	%	no	%			no	%	no	%
A1	204	22.3	711	77.7	915		9	4.4	194	27.3
A2	408	22.6	1395	77.4	1803		19	4.7	352	25.2
B1	439	27.2	1177	72.8	1616		11	2.5	354	30.1
B2	201	33.1	407	66.9	608		4	2.0	97	23.8
B3	49	43.4	64	56.6	113		1	2.0	8	12.5
PT	10	28.6	25	71.4	35		1	10.0	1	4.0
C1	99	30.9	221	69.1	320		1	1.0	37	16.7
C2	930	46.6	1065	53.4	1995		39	4.2	385	36.2
D	248	57.5	183	42.5	431		2	0.8	33	18.0
E	103	69.1	46	30.9	149		0	0.0	4	8.7
SPG	37	75.5	12	24.5	49		0	0.0	0	0.0
SCS	17	65.4	9	34.6	26		0	0.0	0	0.0
* male as a % of male workers in payband and female as a % of female										

Table 5.2: Total payband (full time and part time) by sex – ALMO										
	Male		Female		Total in payband		% of part time in payband*			
	No	%	No	%			Male		Female	
							no	%	No	%
Sc1/6	249	68.6	114	31.4	363	4	1.1	15	4.1	
SO1/2	74	43.3	97	56.7	171	0	0.0	11	6.4	
PO1/4	114	57.3	85	42.7	199	2	1.0	5	2.5	
PO5+	44	72.1	17	27.9	61	1	1.6	3	4.9	
* male as a % of male workers in payband and female as a % of female.										

Table 5.3: Total payband (full time and part time) by sex – FSC										
	Male		Female		Total in payband		% of part time in payband*			
							Male		Female	
	no	%	no	%			no	%	No	%
1	113	17.5	531	82.5	644		8	1.2	235	36.5
2	155	52.0	143	48.0	298		11	3.7	28	9.4
3	28	80.0	7	20.0	35		0	0.0	1	2.9
4	16	80.0	4	20.0	20		0	0.0	0	0.0
5	3	100.0	0	0.0	3		0	0.0	0	0.0
Ungraded	1	16.7	5	83.3	6		0	0.0	5	83.3
* male as a % of male workers in payband and female as a % of female.										

Tables 5.1-5.3 illustrate that the lower and middle grades of all these organisations were dominated by women and the senior grades by men. It also shows that with very few exceptions the rates of men working part time throughout each of these organisations is almost negligible. For example, at the FSC 71.5 per cent of employees at Levels 1 and 2 are women, and 82.6 per cent of employees in Levels 4 and 5 are male, representing a significant gender imbalance. The second critical point is that part-time work is disproportionately carried out by females. It is therefore not surprising that part-time working is most prevalent at Level 1 at the FSC. There are clear gender disparities in each of these organisations, posing significant questions about gender awareness, organisational culture and opportunities to progress within the organisation. Despite the

case study organisations having progressive approaches to equality and diversity, their workforce dynamics are representative of broader gender disparities in the workplace (EOC, 2007c).

The workforce profiles generated from these organisations suggest that gender dimensions are critical to explore. Equality and diversity strategies do not necessarily recognise the inequalities and disadvantages experienced by its employees. The way that these organisations outlined their policies on equality and diversity did not seem to recognise the workforce profiles.

5.4 Equality and diversity: Key dimensions in organisational practice

As already outlined, each organisation demonstrated a strong commitment to equality and diversity. The ‘managing diversity’ discourse was prevalent in defining the equality agenda for each case study organisation. The CGD had available documents dating back further than the other organisations, clearly delineating a development from equal opportunities to ‘managing diversity’. In 1999 – before legislation extended the UK’s equality remit substantially – an equality statement guided the organisation and included the commitment (with regard to employees) that:

‘Employment, training and development are appropriate to ability regardless of gender, colour, race, religion or ethnic or national origin, disability, age, marital status, working pattern, political persuasion, sexual orientation or gender re-assignment’ (CGD, 2001a, p15).

More recently, the commitment in the equality and diversity statement had evolved, clearly signalling that diversity was an integral component of the agenda. In a publication entitled *Dignity at Work*, the organisation outlined its commitment to value everyone and help individuals to achieve their best, as well as protecting employees from discrimination.

‘The [department] values everybody’s contribution and believes that the ... success and its future depend on the quality of service that we provide ... If everyone is to feel valued and we are to help individuals give their best, our goal must be to create and sustain a working environment that is fair to all and free from discrimination, harassment, victimisation and bullying. Through

commitment, action and review, we want to ensure that we have the opportunity to benefit from employment, training and development appropriate to our abilities and regardless of our sex, colour, race or ethnic or national origin, disability, age, marital status or sexual orientation ... We value the contribution which all individuals can make to the success of the [department]. We will strive, therefore, to ensure equality of opportunity for all to compete fairly within the [organisation]. We will provide a service which recognises and takes account of the diverse, multi-cultural society in which we live' (CGD, 2001b, p19).

These characteristics certainly reflect central ideas associated with a 'managing diversity' approach; for example valuing individual contributions and celebrating differences (e.g. Kandola and Fullerton, 1998). The statement also maintains a commitment to more traditional equal opportunities approaches, indicative of strategies that merge a variety of approaches (Noon and Ogbonna, 2001b); and links diversity to both human resources strategies through training and development; and the broader context of associating diversity with multiculturalism. The difficulty is devising and implementing policies that are able to achieve these disparate goals.

Each organisation interpreted diversity as a development from within the equality framework, a progression and evolution of equal opportunities policies. Within this evolution, diversity is perceived to extend the equality remit. One respondent identified how diversity extended an equalities framework, consistent with Cornelius, Gooch et al. (2001) who suggest that diversity is most effective when built on the foundations of equal opportunities. Diversity was framed by several of the respondents to be a more positive and dynamic way to progress equality, particularly compared to equal opportunities which were perceived to be 'old-fashioned', punitive and negative (see also Kirton and Greene, 2005). When a definition of equality was articulated by respondents, the main concepts were that it was about 'treating everyone fairly', 'creating a level playing field' and 'making sure that people weren't discriminated against'. When defining diversity, a positive slant was noticeable. In a glossary of key terms, the ALMO provides a definition of diversity as:

'Appreciating diversity goes beyond the mere recognition that everyone is different; it is about valuing and celebrating difference and recognising that everyone through their unique mixture of skills, experience and talent has their own valuable contribution to make' (ALMO, 2005b, p73).

Several participants commented that diversity was pervasive in all policies. The approach was seen to be more integrative compared to equal opportunities, as an ALMO HR advisor commented:

'Well in the sense that initially equalities and diversity was seen as just another new initiative to which people paid little or no attention. Now it's more a part of your everyday work. It's not just something that you have as an add-on; now people recognise that it's very much a part of what you do. People are encouraged to challenge actions or occasions that are contrary to the equal opportunities policy. So I think that the culture and people's behaviours have been modified by their exposure to the various equalities and diversity strategies.' (ALMO – senior manager)

Despite this more integrated understanding, with the exception of the quote below, interpretations of diversity did not really address organisational culture.

'The purpose of the policies is to kind of work towards a place where people are actually valued for the difference that they bring ... Ideally what we do is have equalities policies that are about bringing everybody in, but then expecting a degree of conformity – people fitting in and behaving in the same way, performing to the same standard. And anyone who deviates from that would not be valued. But the theory behind the policies is that what we are saying is that people come in with a range of experiences that they have from outside the organisation, they bring that into the organisation, and in order to benefit from that experience we need to value the difference that people bring and find a way to give that a legitimate role within the organisation. So there's more than one way to do something effectively.' (CGD – equality and diversity advisor)

The excerpt, from the equality and diversity advisor is unparalleled in the interpretation it offers. It is the only example of diversity being linked to theoretical components, able to transcend limitations of previous equal opportunities approaches, with the analysis and understanding of how inequalities may be experienced and perpetuated within an organisational framework. The excerpt illustrates that there is potential for the policies to be based on a more grounded theoretical approach, but that this approach (as yet) has not been adopted in the organisation.

The selected case study organisations were indicative of organisations with a progressive equality agenda. They exceeded statutory provision in their statements of equality, suggesting that an understanding of diversity and the numerous components that comprise identity were evident. However, the equality frameworks presented by these case study organisations did not engage in an understanding of intersecting or cross-cutting inequalities.

As already suggested in Chapter 2, this theoretical possibility is limited by implementation. 'Diversity' may be a more inclusive and dynamic name for policies, and may be received more positively, perhaps because they are perceived to be for everyone rather than protecting specific interest groups. Within the organisational case studies, participants understood and interpreted diversity differently; some participants implied that diversity was about peoples' differences, whereas others saw it as the next stage in progressing the equality strategy.

None of the participating organisations advanced to the point where organisational issues were considered to be barriers to the pursuit towards equality. Given that these organisations had comprehensive equal opportunities policies and generally applied them, the published material would arguably place them loosely between 'accommodation' and 'integration' on Jewson, Mason et al's (1995) spectrum (outlined in Chapter 2). There were pockets of good practice, but few in the organisation were able to identify and understand the barriers. This was not unexpected given the broad and complex legislative requirements. It was challenging the organisational culture – through transforming the agenda (Cockburn, 1989), assimilation (Jewson, Mason et al., 1995), revising work culture (Kolb, Fletcher et al., 2003) or an emerging diversity paradigm (Thomas and Ely, 1996) – that was virtually non-existent. This suggests that the agenda is weighted towards 'managing diversity' rather than capitalising on the opportunities that the diversity discourses offers to advance gender equality.

5.4.1 The business case as a central driver

The aims and drivers of the agenda also reinforced a 'managing diversity' approach, with a particular focus on the business case. Business factors such as recruitment and retention were consistently repeated as drivers explaining how the agenda had evolved to respond to different needs. Equality and diversity were linked to productivity in the CGD's business strategy (CGD, 2005b). In addition, the CGD highlighted the need to be seen as a world-class service with a strong reputation, whilst simultaneously ensuring that its policies protected it from high employment tribunal costs. Other identified aims of the agenda were expressed by the head of equality and diversity, who emphasised that there were two main aims to the equality and diversity approach within the organisation:

'It aims to focus on making progress to a focus on outcomes and results. The second thing that it seeks to do is to mainstream equalities into wider core programmes. So rather than it being a separate bolt-on activity, what we try and do is fit equalities into the wider themes that the business is pursuing.' (CGD – senior manager, equality and diversity)

This is obviously a strategic approach to equality – perhaps aspiring towards Jewson, Mason et al's (1995) assimilation model – but also perhaps what should be expected from the person whose remit it is to lead it. The excerpt from someone so senior, also demonstrates that equality and business objectives are intertwined.

Business drivers were also identified at the ALMO as driving the equality agenda. In the same way as the CGD, the ALMO expressed its rationale for having a comprehensive equality framework as wanting to provide a high level of service. There were strong links to the Audit Commission, as it is the body responsible for allocating funds to ALMOs: the better the quality of service provided (in all areas), the higher the star rating from the Audit Commission and the greater access to funds (NFA, 2007). This was viewed cynically by some of the interviewees, who suggested that the motivation for pursuing a comprehensive equality agenda was linked purely to funding. Concerns that it was a tick-box exercise, with no substantive understanding from the organisation, were also raised.

For example, diversity awareness training was conducted via a compulsory on-line multiple choice test. And whilst this provides a knowledge base in the area, it appears to resemble a tick-box approach. Perhaps this is to satisfy funding requirements, or perhaps it is due to resource limitations. Either way, it reinforced the lack of knowledge largely demonstrated via the interview data. Diversity training did not seem to have conveyed an in depth understanding of diversity to the ALMO's employees.

The organisation had also adopted the Equality Standard for Local Government which was first established in 2001, with the aim to promote excellence in local authorities. Over 90 per cent of local authorities have since adopted the standard and it has recently been updated to incorporate new legislative requirements and public sector duties in terms of race, disability and gender (IDEA, 2007). The Framework was originally formulated to focus on race, gender and disability and could be adapted to apply to other aspects of diversity. However, the idea that a framework that was originally devised to focus on race, gender and disability could easily be applied to other aspects of diversity is problematic, as it implies an equivalence between equality strands, when in practice there are both qualitative and quantitative differences (see Verloo, 2006 and Chapter 2). Business needs and particularly retention of staff, and being able to address a range of staff needs were also considered paramount – raised in particular by senior HR and managers. There were additional service delivery requirements identified by both the CGD and the ALMO as motivating factors, such as reflecting the community that it served.

The business case stood out at the FSC as the primary motivational factor. Staff morale was added to the business case within the context of recruitment and retention.

'The feel-good factor ... Once you are here and you know that this is the kind of approach that we take – we know our staff like it from staff surveys feedback – and actually our staff are the best ambassadors about why [this company] is a good place to work. I can put up all sorts of posters, and send out all sorts of emails, but it sounds like propaganda. Word of mouth is really good. We get a lot of people who come to us who have got friends and family who work here and

who know that work is flexible in that way and that we are a good employer to work for and that's great'. (FSC – senior manager, HR)

In defining their equality and diversity agenda, the FSC was less reflective compared to the other case study organisations. Diversity was mostly expressed through the business case. Perhaps this is a consequence of private sector organisations not being required to comply with legislation such as the Race Relations Act and Gender Equality Duty. Or perhaps there is less awareness in the private sector in general compared to the public sector. The lack of a dedicated equalities infrastructure may also contribute.

5.4.2 Diversity: Challenging organisational culture?

The WERS study outlines that having an HR function / personnel department increased the likelihood of having work-life balance policies (Kersley, 2006). These case studies suggest that this premise could be extended, in that the presence of an equality and diversity function provided a more strategic equality and diversity framework. Equality at the FSC was within the remit of the Human Resources department. In both the CGD (a unit) and the ALMO (an individual specialist), the roles of equality and diversity were stand-alone. They were focused on service delivery as well as the workforce. At the CGD, the unit had a direct link to the chief executive of the organisation, to demonstrate to all employees the high priority placed on equality and diversity. The remit of the specific unit was to address equality and diversity issues. There was certainly a greater degree of sophistication and comprehension at the CGD, as well as the ALMO, compared to the FSC.

Perhaps it was the combination of a designated equality function within the organisation that led to more sophisticated aspirations. It could be argued that as a result of these functions, the CGD and ALMO were able to develop a more considered and strategic framework aligned to a 'social' motive for equality; or that the frameworks were indicative (at least from data analysis) of an 'integrative' approach – closer to challenging organisational barriers – whereas the FSC would be classified more accurately in terms

of 'accommodation' (not able to challenge organisational barriers). It is likely that other determining characteristics from WERS – such as the work-life balance agenda being more prevalent in the public sector and in large organisations – would be true for equality and diversity as well. For example, the equality and diversity advisor at the ALMO articulated the following in response to a question about the aims of an equality agenda:

'Well I would hope that with the equality and diversity strategy and the equality standard framework which is very systematic and which integrates equality and diversity into every aspect of [the organisation's] business ...' (ALMO – equality and diversity advisor)

'It was my idea to adopt a strategic equality standard framework to progress equality and diversity along and also to adopt the 6 equality strands right from the outset which I did through the impact assessment procedures and guidance, and trained everybody on as well as an equality and diversity strategy and policy. So there seems to be quite a bit of change which is a much more systematic approach to equality. And a much more "diversity" approach as well. The old-fashioned approach was pretty much prevailing before ...' (ALMO – equality and diversity advisor)

The agenda outlined by the ALMO is certainly sophisticated and thorough. But with a somewhat ambiguous interpretation of equality and diversity, it is not exactly clear what the objectives are of integrating equality and diversity into every aspect of the organisation? What broader objective do these outcomes support?

At the CGD, the agenda was presented as aiming to move from 'agenda setting' through to what the organisation termed 'mainstreaming plus' which involved inserting an equalities dimension into all work and processes as well as retaining the specific equality structures (EDU, 2004). Mainstreaming plus set the foundations at the CGD to create a single equality scheme (SES). The SES intends to merge current strands of equality legislation into a single comprehensive and strategic framework (EDU, 2006). In doing so, this scheme reflects the establishment of the EHRC and it seems as though other central government departments are also intent on implementing single equality schemes (e.g. DCMS, 2007; MoD, 2006). Broadly, the scheme attempts to keep the organisation one step ahead of statutory requirements in employment and service delivery. In the CGD's proposed SES, it is written, 'and by this we mean treating people

fairly, providing equal chances while respecting people's differences' (EDU, 2006, p8). These are the same equality goals identified earlier for the CGD and are still ambiguous about combining approaches of treating everyone the same and respecting differences. SES proposals include guidance on diversity impact assessments as a 'key mechanism by which we can ensure that we meet our priority objective of moving from agenda setting for equality and diversity to focussing on results and outcomes' (EDU, 2006, p41). Again this reflected a sophisticated and considered approach towards equality and diversity. A commitment to monitor progress and a comprehensive action plan were also included. The scheme lacked detail on how inequalities would be structured and prioritised which, given the specific issues that this organisation had overcome related to race equality, could be problematic. Like the proposals for the EHRC, as yet there was no intention to address intersecting inequalities or strategies to address areas of multiple discrimination (in employment and service delivery), which – as Crenshaw (1989), amongst others, notes – does not amount to a simple addition, but rather qualitative differences.

In addition, it was not clear whether the SES differs from simply compiling all the policies together into a single framework.

'Every strand, every bit of monitoring, and that has the effect and it is my perception – of turning off people – oh gosh – not more equality and diversity stuff. More paper to do an impact assessment on a new policy ... So a single equality scheme – anything to push down the amount of paper will be one scheme with one set of paper, and one set of actions rather than three [race, gender and disability] different ones. And as far as I'm concerned that can only be a good thing.' (CGD – senior manager, HR)

This cynical view implies that administrative simplicity is the priority of bundling equality strands together, leaving other motivations such as addressing cross-cutting inequalities as secondary. In doing so, the gap between policy documents that aim to address genuine inequalities and potential implementation, which is not necessarily driven by these motives, is highlighted. Although participants working with a specific equality remit envisaged that the SES as well as 'mainstreaming plus' were goals for the entire

organisation, it was tenuous whether the agenda could be genuinely broadened, given the current lack of expertise and commitment throughout the organisation. Other than the head of the equality and diversity unit, no other participant mentioned 'mainstreaming plus', whilst only a few HR respondents knew that the organisation was devising a single equality scheme, but did not really know anything about the content, suggesting a significant gap between strategic equality goals and implementation. And this was in arguably the most progressive of the case study organisations in terms of the sophistication of their equality and diversity approaches. Even when there was awareness, it was not necessarily accompanied by detailed knowledge.

5.4.3 Implementation gap

Other than equality specialists, it was clear that ideas about equality and diversity had not penetrated throughout these case study organisations. The gap between policy statements and implementation was significant. This gap was further exacerbated by a lack of understanding through the organisation. Confusion was common amongst the interviewees about what equality and diversity meant and the relationship between them. For example, in response to a question asking about organisational approaches to equality, a Joint Consultative Committee (JCC) representative at the FSC answered:

'I think that we have Investor in People. And there is also new regulation now isn't there for equality? I am really glad that I have never come across equality issues. I mean there might have been – they don't always have to call on us, to be fair. But the role I am in is sales and it doesn't matter what you are – you just have to sell. That's the important thing!' (FSC – staff representative)

Given that all respondents were chosen by the organisation to be interviewed because of their involvement in the equality agenda, this was an unexpected finding, raising concerns for how the rest of the staff in the three organisations may understand these terms.

Communication strategies such as consultation and representation may further explain the gap between the conceptualisation of policies and their subsequent implementation.

There was an evident gap in the consultation process, particularly related to overall strategic frameworks, where staff in general had not been consulted. At the CGD, staff networks that focused on a specific area of equality were a notable exception. In relation to specific policies, there was certainly more consultation. The voice of unions and staff representative groups was also considered in the context of consultation and communication.

Attempts to consult with staff and bridge the knowledge and implementation gaps were attempted in each of the participating organisations. Participants commented that consultation procedures and policies were not always followed, however. Some commented that it depended on who was leading the consultation, and how quickly the consultation needed to be completed. An HR employee at the CGD added that she did not feel as though they 'owned' the policies, but rather that decisions had already been made. At the same time, this same respondent commented that sometimes there was too much consultation, which meant that it took a long time for ideas to become policy. This was echoed by a senior HR employee. From this and similar examples in other organisations, it seemed as though it was the method of consultation that needed refining, to be more effective and responsive. Across the organisations, those who led consultations thought that there was too much consultation and those who were expected to comment on consultations often felt that there was too little genuine consideration of their views.

Previous work has identified the role of trade unions as a positive indicator for better employment relations (Kersley, 2006), suggesting that the role of unions could guide organisations to conceptualise and implement better equality outcomes for employees.⁵⁴

The CGD had union representation, as well as staff networks representing specific

⁵⁴ The influence of trade unions on work-life balance policies is complex. For example drawing on 1998 WERS data, Budd and Mumford (2004) found that the presence of trade unions was negatively associated with the availability of policies related to working from home and flexible working hours, and positively related to parental leave, special leave and job sharing provision.

interests such as minority ethnic employees, disabled employees and lesbian, gay, bisexual and transgender employees. The ALMO had two unions as well as a staff involvement group, whilst the private sector FSC had a Joint Consultative Committee (JCC) as the staff representative body. The industrial relations literature debates the extent to which JCC's and other employee committees substitute for trade unions, if at all (e.g. Brewster, Wood et al., 2007). There are differences between how these different frameworks function, which has an impact on representation and decision-making. For example, Kersley (2006) suggests that whilst unions have historically been negotiators between managers and employees, employee representative groups seek the views of employees to convey back to managers; this is a different function. In the ALMO, union representatives who were interviewed at times felt marginalised from decision-making. The union agenda at the ALMO reflected traditional union concerns, such as equal pay. One union representative felt as though the voice of the union was no longer being heard. A member of the staff involvement group described the difference in this way:

'The unions – I don't know - I think theirs is rather a more broad brush approach. I feel that the staff involvement group is more sort of a local problem solver for local people – a local problem for local people!' (ALMO – staff representative and manager)

This perhaps encapsulates the idea that the staff involvement group may be preferred by management because it was less autonomous and independent. But representatives from the staff involvement group did not always feel that they are adequately consulted, either. Compared to the trade union representatives, staff involvement groups and representatives seemed to be less well-informed about equality and diversity issues. Again perhaps there is bias in terms of the representatives interviewed, but this does raise questions about the level and type of representation that employers are seeking.

Equality networks were part of the framework at the CGD. Given the history of this organisation, there was a hierarchy of networks, reportedly, with the ethnic minority network being centrally funded by the organisation, representatives allowed time off for

network activities and a direct line of communication to the chief executive of the organisation. The same was not true of the other networks – which created tension between different stakeholder groups. One representative (*CGD – staff representative*) saw the networks' role as 'critical friends' and 'centres of excellence' for the organisation in the development and implementation of equality issues.

Although the ALMO literature outlined the consultation process for policy change in detail, the respondents who were interviewed were not necessarily aware of this complicated process. The CGD and ALMO both outlined responsibilities of each employee throughout its literature in terms of their role in devising and implementing policies on equality. This suggests that these organisations wanted to involve its employees in determining policy. It seems from the evidence above as though there are gaps when translating this into reality. FSC participants spoke of monthly JCC meetings where representatives attended, and could raise issues, with the expectation that they would disseminate findings to their team.

5.5 Implications of a 'managing diversity' framework

This research clearly demonstrates that diversity was part of the equality framework, prioritising dimensions associated with 'managing diversity'. What is less clear is what the implications are, particularly for gender equality. Echoing broader data the workforce profile shows that gender inequalities exist in each of the case study organisations, with a high rate of women in junior and middle management roles, a lack of women in senior roles and very few men working part time. Responding to this under-representation, the CGD and ALMO have devised equality targets. Although there are no formal targets set at the FSC, the HR director outlined a commitment and intention to strive towards a gender balance in the senior levels of the workforce. The ALMO had targets, but they were general workforce targets rather than for career progression. As for the CGD, setting targets (Table 5.4) was in line with the overall Civil Service Framework equality

targets. This included key targets for specific groups that were currently under-represented in the organisation: women, people with a disability and black and minority ethnic (BME) employees. The department was also very careful to articulate that target setting was an aspiration rather than a quota. As part of the Cabinet Office’s public service agreement, Civil Service targets have been set and are revised annually. For 2004-05, Civil Service targets included that:

- 35 per cent of the Senior Civil Service (SCS) are women
- 25 per cent of top management positions are filled by women
- 3.2 per cent of the SCS to be from ethnic minority backgrounds
- 3 per cent of the SCS to be people with disabilities (Cabinet Office, 2006).⁵⁵

The CGD have far exceeded the Civil Service targets for ethnicity and disability. In 2005, 8.7 per cent of the SCS were from an ethnic minority background and 12.5 per cent of the SCS were registered with a disability (CGD, 2005a). Targets had also been established to enhance representation of women in the organisation (Table 5.4).

Table 5.4: Targets to enhance representation of women in the organisation		
Grade	2005 of women staff in post %	2008 women target %
A1	77.7	No target required
A2	77.4	No target required
B1	72.8	No target required
B2	66.9	No target required
B3	56.6	No target required
PT	71.4	No target required
C1	69.1	No target required
C2	53.5	No target required
D	42.5	45
E	30.9	33
SPG	24.5	37
SCS	33.3	37
Source: CGD (2005a, p17)		

Targets responded to under-representation, usually in senior grades. However, these targets for women (Table 5.4) did not necessarily seem very ambitious. For example, for some of these targets, one new member of staff would achieve the target. There are no similar targets to increase part-time working rates for men, or part-time working rates in

⁵⁵ The 2008 targets are: 37 per cent of the Senior Civil Service (SCS) are women; 30 per cent of top management positions are filled by women; 4 per cent of the SCS to be from ethnic minority backgrounds; and 3.2 per cent of the SCS to be people with disabilities (Cabinet Office, 2007).

senior grades where according to data (Tables 5.1-5.3), there was significant under-representation of women. Although often described as gender targets, they are usually targets to increase women's representation (or BME or employees with disabilities). Targets are often portrayed as an answer to under-representation, but only address a small area of gender inequalities. Targets do not necessarily change structural challenges within an organisation. Thomas and Ely (1996) outline that targets measure success (usually related to recruitment and retention goals), rather than the organisational culture. One of the respondents reiterated these sentiments.

'We approach it backwards – we do monitoring ... we've got targets around how many SCS we've got from different groups ... The issues are about how are we going to go about this, and how to make it look more attractive to those people, and not about how are we going to get people to apply to our jobs and say "hey look a lot of diverse people applied". Because when they come in and only stay for 10 minutes ... we do nothing with that. So we are at the wrong end of the agenda and I think that we have been tinkering on the periphery of equalities by doing all the outward facing stuff ... not getting at the heart of it, which is what is it about the culture of this organisation and the sub-culture and the cliques ... but actually what are the practices that make this a difficult place for people to be in ...' (CGD – equality and diversity advisor)

This excerpt is highlighted for its insightful commentary on the inherent organisational barriers. It is from the CGD's equality and diversity advisor, who recognises that without addressing the organisational culture, the equalities agenda will not progress. But this type of insight was unique. Targets should perhaps be implemented as part of the method to achieve wider goals, rather than being presented as the end goal. Targets also need to address all working patterns – not just increasing women's representation in senior organisational grades.

Gender disparities exist despite commitments and aspirations towards achieving gender equality. This disjuncture can be explained in a number of ways. Immediate and obvious explanations emerged from the data, such as confusion between what equality and diversity actually meant and problems with organisational communication methods. However, there were additional factors that were more subtle that further contributed to the gap between the aspiration and the reality. 'Managing diversity' often conveys the

idea of a gender-neutral individual worker that neglects existing organisational barriers to varying degrees. This contributes to the extent that the organisation can be considered to be 'gender-blind' – where gender-neutral terms or policies are located within a gendered organisational culture (Chapter 6).

To an extent, the focus on the individual obscured the surrounding organisational context. Newman and Williams (1995) argue that the term 'diversity' gained political resonance through the 1980s and 1990s 'can imply a shift towards individualism and can signal the further impoverishment of equality policies in the new managerial culture' (Newman and Williams, 1995, p121). Whilst this may seem overly harsh for these progressive organisational case studies – particularly the public sector case studies with comprehensive equality and diversity policies – it does imply that changes have increased the focus on the individual and may have detracted from the scope of equality policies.

The lack of awareness between the high numbers of women working part-time to gender inequalities highlights the disconnect between equality policies and individual working patterns. For example,

'Well it's just giving everybody equality of opportunity, but also recognising that everybody is not exactly the same and in terms of the equal opportunities political correctness, you sometimes have to individualise what an individual's needs are, which may not be the same as someone else. So they could be disabled, but their individual needs might be different and you have to vary that, or take that into account.' (ALMO – HR)

'You have to look at the diversity ... you are looking at a person as an individual and their individual needs. So it looks wider than the equality aspects of it ...' (ALMO – HR)

These statements were not accompanied by significant policy change. Diversity had introduced a new language, but policies had not fundamentally changed. Equal treatment legislation – albeit for a wider range of groups – was prevalent. Other than target setting at the CGD and ALMO which was limited – there were no real strategies articulated for

addressing gender disparities. The FSC did not even have targets. At all the case study organisations, but particularly evident at the FSC was the sense that opportunities (such as promotion) were equally available to all employees. But as the next chapter demonstrates, this was not always true. Organisational barriers such as 'presenteeism' were potentially limiting. The focus on the individual was disconnected from the gender disparities in the organisation.

The definition of diversity that was relied on through these organisations did not allow the theoretical promise that diversity offered to be fulfilled in the workplace. Gender was often perceived to be a women's problem and solutions were targeted towards women. For example increasing women's representation, whilst important as an independent goal, will not by itself challenge gender inequalities.

A 'managing diversity' definition emerged as dominant, rather than a broader concept of 'diversity' which has the potential to overcome dichotomous thinking and / or address intersecting inequalities. The policies that were introduced as a result often 'promote equality of opportunity' whilst 'celebrating difference'. They focused on ensuring that wide ranging equality and diversity statements were in place that extended to a wide range of groups.

Although organisational policies were comprehensive, they lacked a recognition of the organisational culture and broader factors which perpetuated inequalities. As outlined in Chapter 2, under-estimating the embedded gendered nature of organisational culture diminishes the ability of a 'managing diversity' strategy to drive genuine change. These examples, and the understanding and articulation of diversity in these case studies, almost exclusively related to understandings of 'managing diversity' (e.g. Kandola and Fullerton, 1998). The criticisms and concerns raised in Chapter 2 are relevant here and can also be applied to implementation. The individual is prioritised; and the methods

identified to implement new ideas lack detail and still largely related to an equal opportunities agenda – based on complying with anti-discrimination law – albeit with enhanced and more sophisticated language. Senior management and HR directors were seemingly committed to extending the equality agenda. But the evidence pointed to the ‘empty shell hypothesis’ (Hoque and Noon, 2004), whereby policy names have changed, but the implementation has not necessarily changed with it.

5.6 Conclusion: Progressing equality through ‘managing diversity’

In all the case study organisations, there have been changes to the way that equality has been conceptualised, in that it is perceived to be more inclusive and positive. Diversity had been defined as broadening out the equality agenda and introducing a focus on ‘managing diversity’. The result has been a focus on the individual and on the business case. It has meant that the definition of equality is interpreted as ‘managing diversity’ and the concerns raised in the theoretical literature about gender equality being diluted existed in practice.

For the CGD the focus was on race, given its historical organisational legacy. A comprehensive programme for equality and diversity has already been in place for a number of years, and there was still a significant gap between the intentions of the policies and the reality in terms of gender. The achievement of targets is presented as a success, but in reality they should be perceived as part of a broader goal and, as will become clearer in the next chapter, organisational culture still harboured gendered stereotypes. This may be changing; but with the creation of a single equality scheme, there is concern that it will dilute all equality strands, including gender equality. Although an understanding of how inequalities are perpetuated existed in the organisation’s literature, these messages were not adequately conveyed to staff, nor did they translate effectively into policy strategies.

The ALMO was noteworthy in the way that it straddled the public and private sectors. Most employees had worked at the local authority that preceded the ALMO and there were mixed opinions from respondents about the benefits and shortcomings that the change had brought. The example of representation by staff involvement groups and trade unions was perhaps indicative of how this organisation would continue to develop. It seemed that a comprehensive framework often associated with local government had been inherited by the organisation, but the gulf between policies and implementation was growing without the necessary infrastructure to implement it. For example, the inclusion of broad policy statements was common. The ALMO outlined its position in the equality and diversity statement:

'By promoting diversity we appreciate and value the different life experiences, skills and perspectives different individuals can bring. [The ALMO] will celebrate the diversity of our community and staff and look at how we as an organisation can actively value those differences. This means that we will recognise people's different service needs and make our services relevant to their potential needs. As an employer we will actively empower our staff to develop their potential and take pride in their abilities and resources' (ALMO, 2005b, p3).

But where were the policies that facilitated that goal? What policies 'actively empower [the] staff to develop their potential and take pride in their abilities and resources'? And what exactly was the goal? There was a noticeable gap between the policies and application in this organisation.

The same could certainly be said of the FSC. I was specifically allocated participants with an active role in equality policies in the organisation to interview. Based on this allocation, it would be fair to assume that these people had the greatest interest / knowledge / engagement in the equality process. However, in this organisation there seemed to be the greatest disparity between senior HR employees and the other participants. A complex understanding of the issues associated with equality was severely lacking. The business case was paramount. For example, in response to a question on equality, a staff representative (who is also a manager) responded:

'I've recruited men and women in roles. I've recruited Asian staff, British staff – so it's very much encouraged here ... There is no underlying – oh no – you mustn't do this or you mustn't do that. From my point of view, what I need to get right when I am recruiting someone is how that person will get on with the customer ... you have to think a little bit more cleverly about how you recruit because it's got to work with the customers' (FSC – staff representative and manager).

Despite the emphasis on the business case, the case study organisations nonetheless embraced a progressive equality framework compared to other organisations. In doing so, however, they were not able to articulate an agenda that would truly progress equality – gender or otherwise. Despite significant progress, they were trapped in their inability (and perhaps unwillingness) to recognise organisational and structural barriers that reinforce gender inequalities. Thus far this understanding is not widespread through any of the case study organisations; and this has implications for the conceptualisation and implementation of work-life balance policies.

6.0 GENDER DIMENSIONS OF WORK-LIFE BALANCE POLICIES

6.1 Introduction

Drawing on data generated from the case study organisations, this chapter focuses explicitly on work-life balance policies. This chapter begins by locating work-life balance within the context of diversity. A ‘managing diversity’ approach, with a significant business case focus, is prevalent. The extent to which social and moral motivations have combined with the business case was different in each of the participating case study organisations. The business case has been the lever that the Government has used to encourage organisations to implement work-life balance policies (Chapter 4). Whilst there are advantages associated with the business case, such as increasing recruitment and retention, this focus also raises concerns. For example, questions emerge about whether, in connecting work-life balance policies so explicitly to the business case, gender equality goals – which are valued in principle by the participating case study organisations – can be effectively pursued.

Each of the case study organisations offers a different range of work-life balance policies. These are presented alongside statutory provision in Tables 6.1 and 6.2. Following this overview, gender dimensions of work-life balance policies are considered in depth. The conceptualisation of work-life balance policies in each of the case study organisations raises similar issues to those in the Government’s agenda (in Chapter 4) – for example, about the tension between the ‘work-life’ and ‘work-family’ agendas, and the extent to which policies encourage traditional gender stereotypes of work and care. Traditional gender stereotypes are evident and the gendered organisational culture, although at times subtle, may limit the potential effectiveness of work-life balance policies in addressing gender disparities.

The interview data highlight other issues common throughout the work-life balance literature, such as the degree to which work-life balance policies are considered

'women's issues / problems' (in the same way as equal opportunities policies) (Liff and Cameron, 1997), and the role and discretion of line managers in administering and managing requests and changes in work patterns (Yeandle, Phillips et al., 2003). Gaps in monitoring and evaluation of current policies (Dex and Purdam, 2005) were raised as an additional issue that limit the potential effectiveness of work-life balance policies.

Organisations are 'gender-blind' to varying degrees, lacking a comprehensive consideration of wider gender inequalities or gendered aspects of organisational culture (Haas and Hwang, 1995; Smithson and Stokoe, 2005). And the emphasis on diversity exacerbates the extent to which organisations are 'gender-blind' because of the focus that is placed on the business case and on the individual employee. Work-life balance policies remain 'women's issues' – despite universal aspirations, and in practice policies are primarily conceptualised with women, and particularly mothers, as the target group.

6.2 Work-life balance in an organisational context: 'Managing diversity' prevalent

In all three of the case study organisations, the work-life balance agenda was framed within the context of diversity, with 'managing diversity' dominant. The business case was explicitly identified as the key driver. The link between productivity and work-life balance policies was made clear, with recruitment and retention crucial. The strong emphasis on the business case is however complex. Whilst work-life balance policies have been perceived as necessary to respond to labour market changes alongside demographic challenges, particularly to the increased number of women in the workforce, many policies in practice can serve to reinforce gender stereotypes and inequalities. The individual focus typical of a 'managing diversity' approach cannot provide genuine choices for women and men to balance their 'work' and 'life' in the context of current gender disparities as outlined in Chapter 1. Rapoport, Bailyn et al. (2002) outline a 'dual agenda' that recognises and simultaneously pursues workplace performance and gender equity goals. The dual agenda is proposed as an effective way

to encourage organisations to 'buy in' to the gender agenda, whilst at the same time improve workplace effectiveness and productivity. For the CGD as well as the ALMO, there was an explicit equality dimension alongside encouraging the business case (Chapter 5). For the FSC, the work-life balance agenda was almost entirely driven by business case objectives alone.

Each of the case study organisations interpreted diversity as a development and progression from within the equality framework. The extract below from the director of the equality and diversity unit at the CGD outlines the evolution from equal opportunities to diversity within the broader equality remit, and how work-life balance policies fit in.

'I actually see it as a development within. If you look at the whole area, in a sense it started out being talked about as equal opportunities, it's increasingly talked about as equality and diversity ... So the whole issue of work-life balance I think is a kind of a development within a wider equality and diversity template. It doesn't just fit within equality and diversity; it also is a business related development ... So it's not just driven by a benign commitment or a positive commitment to equality and diversity issues, it's also business driven.' (CGD – senior manager, equality and diversity)

The essential components were that diversity had evolved and developed from within equality to address wider business concerns more effectively. Connecting diversity and work-life balance so explicitly to the business case suggests a preference to manage diversity, and in doing so re-calibrating the social justice or moral imperatives that may have been previous drivers. However, these extracts perhaps support Dickens' (2000, p144) argument that 'social justice or altruistic considerations probably have most purchase when operating in combination with the organizational self-interest or compliance factors'.

In responding to questions about the relationship between diversity and work-life balance policies, the quotes below further articulate the importance of a diversity approach, linked to a wider social narrative. Perhaps the suggestion that social and moral considerations

have most purchase (for equality approaches) when aligned to the business case can be extended to work-life balance policies.

'Equality and diversity is about looking at people as individuals, looking at each person's set of circumstances on their own merit, ensuring that our policies and procedures are fair and reasonable, equally implemented across all groups to ensure that every member of staff within the organisation should be able to benefit from more employment policies and practices that are actually designed and developed around equality legislation and human rights legislation. So for me it would be ensuring that anybody in the [organisation] irrespective of race, gender, ethnicity, disability – they would have the same options to tap into employment policies and get suitable outcomes so that they can manage their work-life balance in an appropriate way. Yet still not lose sight of what the [organisation] is here to do. So basically equality and diversity as is work-life balance is everybody's business ...' (CGD – senior manager, HR)

'Work-life balance is such a vital life ... existential factor for key equality strand groups such as single parents, carers. It's absolutely vital. I think that it's really a part of the equality and diversity agenda. And any organisation that doesn't promote this wholeheartedly I would think is also not promoting equality and diversity and not committed to it.' (ALMO – equality and diversity advisor)

The connection to diversity immediately suggests that work-life balance policies are not only for everyone, but can also respond to individual employee needs simultaneously. For the FSC, the work-life balance agenda was explicitly about deriving benefits for the business. This mirrored the business benefits outlined by the Government, including motivating staff, saving on recruitment costs, reducing staff turnover, reducing absenteeism, attracting and retaining a talented workforce and improving customer service (DTI, 2004f). In a study of small and medium businesses (SMEs) of under 500 employees, reasons such as 'helping the individual' and 'individual requests' were cited as factors contributing to the development of work-life balance policies (in addition to statutory provision) (Dex and Scheibl, 2001). This type of approach may be more responsive to supporting individual employees' needs and may result in tailoring informal policies to the individual. It is an approach that is reflective of other financial service organisations (McCall, 2005; The Times, 2007). The FSC had translated 'work-life balance' policies into 'working-life solutions' which was defined by a senior manager as 'a give and take approach to meeting the needs of the business and the individual'. The head of HR outlined the process that led to the adoption of the term 'working-life

solutions', commenting that it captured the essence of what the organisation was trying to achieve – not 'necessarily wrapped up in jargon'. The emphasis on 'solutions' rather than 'balance' may be semantic, but several participants commented that it differentiated their organisation from others, creating an enabling atmosphere, with wider access to opportunities.

Solutions imply that there exists a 'problem', something that needs to be solved, and that the company are taking responsibility to help employees resolve the problem. Arguably, more active than some of the alternatives suggested by academics in Chapter 4 that focus on integration and harmonisation, the aim is to find a 'solution' for each individual rather than to balance or integrate their different responsibilities. Compared to other terms, this perhaps represents a uni-dimensional process in that solutions must be found to accommodate work, whereas other terms may imply a more reciprocal relationship between different components. Managers were expected to be accommodating, to adopt 'the spirit and guidance of the policy', to work towards a creative solution for both the individual and the business, and to generate a positive working environment for all employees.

'And it's not – we've got to do this so that we are legally compliant, it's – we want to do this. We want our staff to get the most out of it, because when our staff are happy ... we get to retain those staff ...' (FSC – HR)

Working-life solutions went 'hand in hand' with the aims of supporting staff as well as business needs. It was considered to be 'win-win' for both employers and employees. However, the emphasis on the business case raises concerns – that the business case does not necessarily consider equality in great detail.

Work-life balance policies are part of the diversity agenda. The organisational drivers articulated for the work-life balance agenda and the business case are similar to the drivers of equality and diversity frameworks (Chapter 5). It is clear why the business case is a strong motivational factor. It is supported by the Government, provides measurable

objectives (for example, retention rates), and is considered to generate a positive relationship to bottom line profitability and service delivery for many organisations. The benefits offered by the FSC were considered to be overwhelmingly positive. The link between productivity and work-life balance policies was made clear, with recruitment and retention identified as critical. However, as argued previously, the strong emphasis on the business case is problematic. It relies on a narrow understanding of equality and fails to adequately recognise equality issues beyond the business benefits. Work-life balance policies are important and necessary for organisations. It is the extent to which many organisations rely on the business case – which overlooks structural inequalities in preference to offering individual opportunities in the workplace – that contributes to the perpetuation of gender inequalities.

6.3 Work-life balance policies in case study organisations

The case studies were selected in part for the wide range of work-life balance policies they offered (Chapter 3). Tables 6.1 and 6.2 outline the policies that the case study organisations considered part of their work-life balance provision (alongside statutory provision). The information was generated from published documents that were obtained from the organisations, and from information in the questionnaire administered as part of the research (Appendix B). There is both variety in the range of policies offered, as well as differences in specific details such as wage replacement rates and eligibility criteria.

These policies are set within the wider context of operational hours. Government-sponsored research found that just under half of workplaces were open for the standard working week of Monday – Friday, with a third of workplaces open seven days a week (Hayward, Fong et al., 2007). Sixty-eight per cent of offices operated during standard hours, covering 87 per cent of employees (Hayward, Fong et al., 2007). The organisational case studies all included services that stretched beyond the standard five-day week. As part of the Government's modernising agenda, the CGD has established a

direct service that operated outside working hours (through the night and on weekends). The director of the service highlighted that due to the flexibility in hours and the fact that employees who work for this service are based at home, it offered a unique way of working that could satisfy a variety of personal circumstances, including family commitments, hobbies, leisure activities and flexible retirement. She said that most of the employees who were working (or had worked) in this part of the organisation (where only internal transfers are accepted) moved because of the flexibility it offered. The service was also being used as an example of best practice for the rest of the organisation and has the potential to be used as a template for other government departments. The ALMO had housing offices which were open at the weekend and was thinking of ways of increasing weekend provision. And the FSC had a call centre that operated outside working hours, as well as branches that opened on Saturday mornings.

Tables 6.1 and 6.2 demonstrate that these case study organisations offer in excess of statutory provision. These organisations have responded to the Government's call for work-life balance policies that aims to encourage employers to voluntarily provide for their employees (identified in Chapter 4). These policies address when staff work, where staff work, giving staff a break (DTI, 2004f). Additional services such as counselling and support were also offered. And aspects such as health and well-being and corporate social responsibility were identified as areas where perceived opportunities to further progress the work-life balance agenda were acknowledged. Some of the respondents mentioned that work-life balance policies could facilitate additional study, hobbies and leisure time. The specific policies and how they combine as a policy package and the resulting gender dimensions, is the focus of the remainder of the chapter.

Table 6.1: Summary of work-life balance policies in participating case study organisations and statutory provision⁵⁶

	Statutory provision	CGD	ALMO	FSC
Policy				
Maternity leave	- Entitlement to 52 weeks' maternity leave. This is comprised of 26 weeks' ordinary maternity leave (OML) and 26 weeks' additional maternity leave (AML). - From April 1 2007, statutory maternity pay (SMP) is paid for 39 weeks'. 6 weeks' paid at 90% average salary. Remaining 33 weeks' paid at either flat rate of £112.75 per week of 90% of weekly wages – whichever is less. - Between 2003 and 2007, statutory maternity pay (SMP) was paid for 26 weeks'. 6 weeks' paid at 90% average salary. Remaining 20 weeks' paid at either flat rate of £100⁵⁷ per week of 90% of weekly wages – whichever was less. - Increased emphasis on keeping in touch schemes. - Entitled to return to a similar job with the same terms and conditions. - Maternity allowance is available for those not eligible for SMP (eg. self-employed, changed jobs during pregnancy, low income or periods of unemployment). Source: (BERR, 2007b)	- In addition to statutory provision, an employee will be paid her normal salary (for 26 weeks') provided she states her intention to return to the Civil Service and agrees to repay any payment of salary if she fails to return. - Eligibility is based on 26 weeks' continuous service.	- In addition to statutory provision, an occupational scheme exists. - Eligibility is based on six months' continuous service and the intention to work for at least three months - Occupational maternity pay: first 6 weeks' statutory maternity pay. Then choice of: either 30 weeks' at half pay plus 20 weeks' SMP for first 20 weeks' of half pay. Or 15 weeks' full pay plus 5 weeks' SMP	- Statutory provision
Paternity leave	- Up to 2 weeks' leave. - Employee must have 26 weeks' continuous service and have responsibility for the child. - Statutory Paternity Pay (SPP) of £112.75 a week or 90% of average weekly earnings if less than this. Source: (BERR, 2007d)	- In addition to statutory provision, 'maternity support leave' is paid at normal salary (for 2 weeks) - Eligibility is based on 26 weeks' continuous service.	- One week leave paid at statutory rate plus one week of Parenthood Leave which is paid at normal salary. - Eligibility is for partner or spouse of pregnant woman and is based on 26 weeks' continuous service	- One week leave paid at statutory rate plus one week paid at normal salary. - Eligibility is based on 26 weeks' continuous service

⁵⁶ This table provides an overview of statutory requirements in the UK (in December 2007) and additional provision offered by case study organisations. Changes to statutory provision on April 1 2007 are not necessarily reflected in the organisational case studies as data was collected in 2006.

⁵⁷ This rate of pay increased over time.

Cont. 6.1	Statutory provision	CGD	ALMO	FSC
Policy				
Adoption leave	- Similar to maternity and paternity leave (as above). Ordinary Adoption Leave (OAL) is for 26 weeks'. Additional adoption leave (AAL) is for a further 26 weeks'. Paternity leave is available for 2 weeks'. - Statutory Adoption Pay (SAP) is paid for 39 weeks'. Source: (BERR, 2007c)	- Similar provision to organisational provision for maternity and 'maternity support leave' (as above).	- Similar provision to statutory schemes.	- Statutory provision.
Parental leave	- Up to a maximum of 13 weeks' unpaid time off for parents to care for a child (aged under 5 or the fifth anniversary of adoption). Parents of children who receive the disability living allowance (DLA) are entitled to 18 weeks' leave up until the child is 18. - Each parent is eligible to take parental leave – conditional on 52 weeks' service. Source: (BERR, 2006b)	- In addition to statutory provision, entitlement is extended for parents of children until child's 8th birthday	- Statutory provision	- In addition to statutory provision, entitlement is extended for parents of children until child's 11th birthday
Right to request flexible working	- Obliges an employer to consider an employee's request for flexible working. It covers the number of hours an employee works and the time and place of work. - An employee must be a parent with a child under six years of age; or under 18 if they are in receipt of the DLA; or caring for an adult (who is a spouse, partner, civil partner or relative and / or lives at the same address). - An employee must have 26 weeks' of continuous service. - An employer has a 'duty to consider' an employees' request. An employer can refuse / accept the request, but in doing so needs to prove business reasons. - An employer can use business reasons for granting the request. Source: (BERR, 2007a)	- Statutory provision	- Statutory provision	- Extended statutory right to request to all employees who have 26 weeks' continuous service and have completed their probationary period.

Cont. 6.1	Statutory provision	CGD	ALMO	FSC
Policy				
Short-term/ emergency leave	- Provides protection for employees to take leave for dealing with specific circumstances. - Dependents are considered to be partner, child, parent or someone living with you. - Employees are entitled to time off to deal with an illness of a dependent, unexpected changes to childcare arrangements, or to deal with matters arising from the death of a dependent. - There is no obligation for your employer to pay you, although some do. - The length of time off is described 'as long as it takes to deal with the immediate emergency'. Source: (BERR, 2006a)	- Each application is considered individually. - Special leave with pay (not exceeding 5 days) can be granted by line managers covering a variety of personal circumstances - Special leave without pay can be granted for longer periods.	- Up to 5 days' paid leave possible.	- Reasonable requests are always considered. They are not always paid. - A carer can take up to 3 days' paid leave for emergencies involving a dependent.

Table 6.2: Additional work-life balance provision in case study organisations			
	CGD	ALMO	FSC
Childcare ⁵⁸	- Childcare support scheme includes assistance through childcare vouchers and for meeting additional needs such as childcare expenses to enable training, attendance at conferences. - Available to full-time and part-time staff.	- Childcare voucher scheme.	No provision available
Career Breaks	- Career breaks are periods of unpaid leave granted to staff who, for domestic reasons, might otherwise resign. - The normal period granted for a career break is between 12 months and three years, although extensions are possible depending on circumstances. - Eligibility is based on a number of factors that include: a satisfactory performance record; minimum of 12 months' service; an intention to return to the department. - Staff will return to the same pay band and hours of employment. There is no guarantee of returning to the same post / location. - Keeping in touch scheme during career break where relevant information sent and training opportunities offered.	- Aim is to encourage employees to have a long-term career with the organisation: 'The career break scheme is intended to be a proactive response to "work life balance issues" and is vital to our attempts to retain experienced staff and our commitment to equal opportunities' (ALMO, 2005a) - There is no guarantee of returning to the same post. - Can take between 6 months and 4 years, depending on circumstances. - Eligibility based on 2 years' continuous service.	- Available to all employees. The rationale is: 'The Group acknowledges that staff, at all stages of their lives, work best when they are able to achieve an appropriate balance between work and all other aspects of their lives. This balance is often tested if staff want to travel, following the arrival of a new baby, pursue voluntary work, when caring for a dependent or disabled relative, etc...' - It is a 'non-contractual (discretionary) benefit' - Expectation that people will work 2 weeks' every 12 months
Buying and selling holiday	No provision available	No provision available	- Can buy and sell up to 5 days' holiday – but must take at least 20 days' leave each year. Part time is pro-rata - Each year is separate.
Team based rostering	No provision available	No provision available	- 'An approach to organising staff time which allows teams to develop their own working rotas, in consultation with their line manager, to give them ownership of their working hours'.
Counselling and support	- 24 hour service available	Counselling and support service available.	No provision available

⁵⁸ The UK government launched the National Childcare Strategy in 1998, with a Ten Year Strategy for Childcare published in 2004. These proposed “accessible, affordable and quality childcare” for children 0-14 in every neighbourhood (10 Downing Street, 2007). Major expansion in part-time free education for 3-4s has since occurred and tax credits are available to assist with childcare costs.

Cont. 6.2	CGD	ALMO	FSC
Flexi-time ⁵⁹	- Flexi-time – open to full-time and part-time employees. Allows employees to alter start, finish and lunch times within core hours. - No impact on employment contract.	- 'Flexi-time is discretionary and is a concession to staff and not an individual's right ... Once management has exercised it's [sic] discretion to allow flexitime all members of staff in the section must comply with the procedures' (ALMO, 2005c). - Compliance may mean working core hours between 10-12 and 2-4 with the rest of the day flexible.	No provision available
<i>Available at all the participating case study organisations with similar provision</i>			
Job sharing ⁶⁰	- Responsibilities of one full-time job are shared between two or more employees. - Duty is usually on employee to find job-share partner.		
Home working	- Discretionary and issues such as management, security risks and health and safety need to be considered.		
Compressed hours	- Allows an individual to reduce the number of days worked by increasing the number of hours worked each day.		

The wide range of work-life balance policies offered (illustrated in Tables 6.1 and 6.2) was positively received and welcomed by all participants across the case study organisations. However like in the literature, when analysing policies in more detail, tensions and contradictions begin to emerge. Hyman and Summers (2004) identified seven problems with work-life balance policies in the UK, which were: uneven adoption, lack of formalisation, restricted employee voice, business pressures, working time, temporal adjustments, and the persistence of the second shift. Many of these themes emerged through the case studies, and are analysed below in the context of their gender dimensions. Other issues relating to communication, eligibility and availability are also presented.

⁵⁹ Flexi-time schemes typically define core hours during the day (usually 10am – 12noon and 2pm – 4pm), during which time employees are required to be available; these are also only times when meetings / appointments can be scheduled. Employees arrange the remainder of their day around these core hours. Each day employees may be in at different times (around core hours).

⁶⁰ The case study literature on job sharing does not specify how widely job sharing is available through the case study organisations.

6.3.1 Gendered conceptualisation of work-life balance policies?

Whilst it was clear that a wide range of work-life balance policies were available at the case study organisations (Table 6.1 and 6.2), the way that policies were conceptualised raised questions about who they were targeted towards. Similar to the themes highlighted in Chapter 4, when policies were for ‘everyone’ they were skewed towards parents; and when policies were targeted towards parents, mothers were seemingly the target group.

The way that policy packages of maternity, paternity and parental leaves are configured can begin to address (or not address) gender inequalities (Deven and Moss, 2002). The policy package for parents around the time of birth or adoption revealed a bias towards maternity leave, thereby supporting traditional gendered notions of caring. In the public sector in particular, maternity pay was generous compared to statutory requirements. Recognising that of course maternity and paternity leaves are necessarily gendered, there was a disproportionate emphasis on maternity provision where the package offered was generous by offering full salary or a high wage replacement rate. The CGD offered full salary (for 26 weeks), and the ALMO offered a slightly less generous salary package, although still considerably more than statutory requirements (Table 6.1). Eighty-four per cent of public sector organisations offered at least some portion of maternity leave on full pay (Kersley, 2006)(see Table 4.3). Similarly, these case study organisations exceeded statutory requirements for paternity pay, with the CGD again offering full pay for the duration of the leave and the ALMO and FSC offering one week at full pay and the other on statutory pay (Table 6.1). The benefits – in particular the high wage replacement rates – provided for maternity leave at the CGD as well as the ALMO compared favourably to paternity leave (which although generous, was not as substantial) and according to one HR advisor, fathers were advised to take annual leave in order to maximise their ability to maintain their wage during their leave. The rationale for this imbalance is difficult to ascertain. The policy agenda does indeed contribute, as the emphasis on maternity

leave lends itself to supporting assumptions that rely on traditional gendered notions of caring (Chapter 4). The fact that the CGD refers to paternity leave as 'maternity support leave' supported this further, echoes the Government's preference for mothers as primary carers and fathers in a supporting role (DTI, 2005d; 2006d; also Chapter 4). Whilst generous maternity provision is welcome, coupled with 'maternity support leave' it skews provision and implies parental stereotyping.

Organisational provision related to the right to request flexible working was more difficult to disentangle. The FSC was proud of its commitment to extend the 'right to request' to every employee. In 2005, 38 per cent of companies extended the right to request beyond statutory groups⁶¹ (Shanahan, 2005). A TUC report documented other organisations that had similarly extended the right to request flexible working to all their employees, including other financial services organisations (TUC, 2005b). None of the case study organisations were able to provide data on the number of people who had either asked for flexible working under the 'right to request' or been granted it. As the discussion in Chapter 4 highlighted, this is not uncommon, as there is not much data collected on the 'right to request' and existing data are ambiguous. What is known is that more women are aware of the right to request flexible working and apply to work flexibly. The right to request flexible working is also used as a way to promote an organisations' willingness to be flexible – particularly for women. For example, in an advertisement for a special supplement about 'where women want to work', KPMG asks readers to consider the following when applying:

'Last year, we received 439 requests from our people to create a special working arrangement. After carefully examining the business needs behind each application, we ended up approving all but three of these requests. Or to put it another way, we say yes 99% of the time' (The Times, 2007, p5)

Whilst it is not clear whether all these people applied under the 'right to request' – as this advertisement could imply that employees requested any other type of working

⁶¹ At the time of this report, the right to request flexible working was only available to parents with children under 6, or under 18 if in receipt of Disability Living Allowance.

arrangement – it nonetheless conveys a powerful message and commitment to flexible working. And advertised in a supplement especially for women, it is likely to provide women with a ‘sense of entitlement’ to request flexible working.

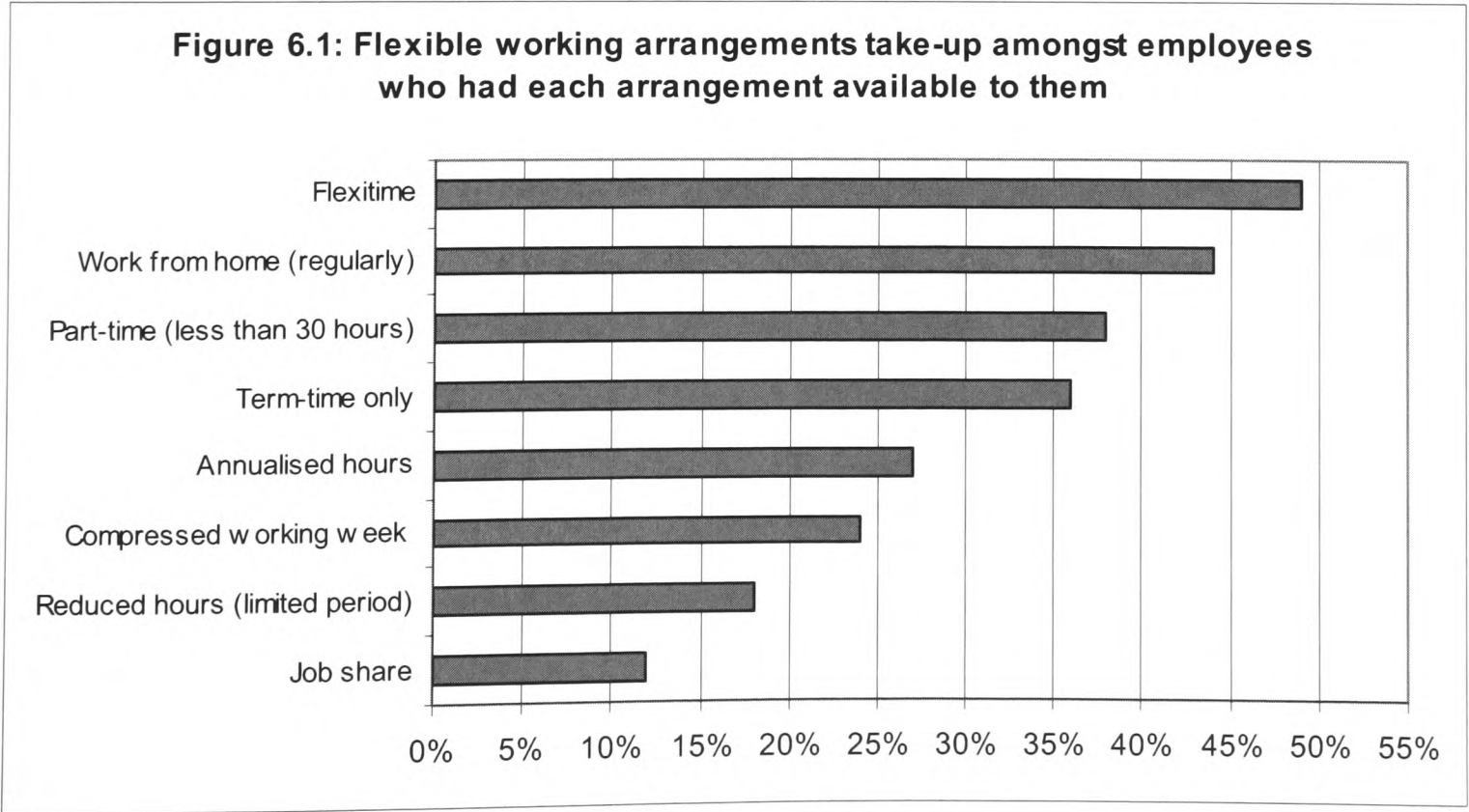
Some insights generated by interviewees suggested that employees prefer to simply work part time rather than utilise the ‘right to request’, which is perceived by some to be bureaucratic and rigid. Other research has observed similar obstacles (Holmes, Ivins et al., 2007).

‘Technically according to the letter of the law, once you change your contract under flexible working, you are not supposed to change it back ... when you request it, you have to give a lot more information, like how will that benefit the business, how will the business be covered when I’m working these hours and it’s also quite tight deadlines in it ... So really for a member of staff part time is better ... because you can chop and change.’ (CGD – HR)

This comment implies that the right to request flexible working has only been used to alter working hours from full time to part time, whereas the legislation allows for broader requests, such as annualised hours or consideration of changing work location. It perhaps suggests that the right to request flexible working is not being used to its full potential.

All organisations offered part-time working and, as demonstrated by the statistics provided in Chapter 5, women worked part time at a higher rate compared to men. Organisational data on take-up rates for part-time working were comprehensive (in Tables 5.1-5.3, Chapter 5). Whilst reasons for this are not documented, it is possible to speculate that these data may be easier to collect as it is likely to be part of employees’ employment contracts, and may relate to employees’ salaries. Part-time work is also a useful mechanism to regulate workflow capacity, and is also a means by which organisations often demonstrate their commitment to work-life balance practices.

In addition to extending the right to request flexible working to every employee, the FSC offered other generous and arguably creative policies. For example, the ability to buy and sell holiday days, and team-based rostering, are not commonly offered in other organisations. The HR director remarked that decisions on extending provision were measured against the likelihood of take-up, and that experience suggested that take-up of any provision rarely exceeded 10-15 per cent of the workforce (with the exception of part-time working). The potential benefits to be derived distinguished the organisation as an employer of choice, with the 10-15 per cent of employees utilising the policy being grateful and enhancing their loyalty to the organisation. Data were supplied by the FSC on take-up of carer leave, career breaks and parental leave, where utilisation was generally low. In 2006, fifty-five employees (5.5 per cent of the workforce) reported taking carer leave (although there is no information on length of leave), seven employees (0.7 per cent of the workforce) were granted a career break and one employee took parental leave (0.1 per cent). Data were also supplied for 2004 and 2005, but there were no significant differences. This low utilisation supports the HR director's experience of low take up. Notably, all these leaves are unpaid, which is associated with low utilisation levels (see below). Take-up figures generally reflect broader data presented in Figure 6.1.



Source: Hooker, Neathey et al. (2007). Figure 3.2

Utilisation rates tend to be higher for policies where there are no negative financial implications for the employee, such as flexi-time. Both flexi-time and working from home, which have the highest rates of utilisation, do not usually have negative financial or contractual consequences. Employees who utilise these policies largely retain their contractual terms and conditions of employment, and these policies increase the employees' levels of autonomy over their working hours. For policies where there is an impact on an employee's salary, utilisation rates decrease substantially. As financial considerations are often the most significant criteria for many people in deciding and negotiating their working arrangements, the associated impact on salary has consequences that not everyone can afford. Unpaid leaves – such as the ones offered in the case study organisations – arguably constrain the vast majority of the workforce, where the type of provision, as well as people's personal circumstances constrains 'choice'.

As indicated in Table 6.2, flexi-time was not available at the FSC, and was 'discretionary' at the ALMO. Research has highlighted that flexi-time is the work-life balance arrangement that many employees did not have but wanted most (Hooker, Neathey et al., 2007). It was often the ability to manage one's own time at the beginning or end of the day, or at lunchtime, that would be most beneficial for employees. In many cases, people may not even want to reduce their working hours, but just to modify them (Jackson, 2007).

Flexi-time is often associated with autonomy which, according to some research, provides additional benefits, as employees feel more in control of their time (Fagan, 2001; Jones, 2003). Research has shown a connection between work characteristics and being able to integrate work and family life: 'They show that participation, autonomy, challenge and control over the conditions of work, including time, all have important effects on employees' ability to integrate their work with their family lives' (Fletcher and

Bailyn, 2005, p172). This benefit seemed to be valued differently through the job hierarchy, as more senior managers exhibited more control over their working time (discussed in further detail below). This gap between opportunities for flexibility translated more generally to a gap between managerial positions and head office compared to those delivering front-line services across all the organisational case studies, and was a theme throughout.

When exploring flexi-time in further depth through the case studies, it seemed that certain groups of workers were not eligible. Some respondents at the ALMO commented that flexi-time schemes were rigid as managers needed to be informed in advance, limiting the autonomy and flexibility of flexi-time. This may help explain why the FSC did not offer flexi-time given a seemingly progressive approach towards 'working-life solutions'. The FSC may be reluctant to offer flexi-time because take-up may exceed the 10-15 per cent threshold that the HR director outlined was easy for the organisation to absorb, particularly because there are (usually) no salary or contractual implications associated with flexi-time. The lack of flexi-time at the FSC may be a business requirement, to ensure cover through the day; however, a HR respondent did question why the organisation did not offer it to employees when other arrangements were encouraged. Perhaps management was reluctant to offer flexi-time because of fears that coverage could not be guaranteed. Changes in financial services companies more broadly, such as the move towards provision of services on-line and outsourcing services to call centres, are likely to reduce the functions of branches and may offer scope for increased flexibility.

Whilst it was clear that a wide range of work-life balance policies was available at these organisations, issues arose through the interviews about entitlement, eligibility and availability of utilising provision. These policies were supported by all the research participants in principal, but data that existed on utilisation showed that take-up of formal

policies was low, with the exception of part-time work. The following section explores some of the reasons for this apparent discrepancy.

6.3.2 Gender as ‘women’s issues’

In each of the participating case study organisations, gender often equated to women, with work-life balance policies understood to be about ‘women’s issues’ (e.g. Liff and Cameron, 1997). Throughout the interviews, participants (both male and female) responded to questions about gender with answers relating to there being too few women in senior roles, career progression being a problem for women and policies being directed towards mothers. This lack of gender awareness in the workplace suggests that unequal gender relationships may be reproduced in the occupational sphere (Crompton, 1989; Walby, 1986). It skews work-life balance provision firmly towards women and limits the entitlement and flexibility that men may have access to.

‘What most of us would do is choose not to go into that next level. I am sort of at the level just before senior civil service and it doesn’t interest me. I have other things to do with my life and I can manage this job.’ (CGD – equality and diversity advisor)

‘I don’t know. My particular manager ... the impression that she gave me is that she’s paid quite well, so she doesn’t want more responsibility. She is happy enough where she is. But that’s just my opinion and her opinion. But when you do look at the Directors, the five main Directors are all men. And it would be nice to see a woman. But then you don’t want to just put a woman in there to make it look equal – you want it to be right ...’ (ALMO – staff representative)

The gendered nature of the organisational culture is evident in the quotes. The case study organisations’ gendered subculture may be stronger because of the organisations’ inability to recognise that it exists (Halford, Savage et al., 1997). In a report on a local council, Godwin (2006a, p6) outlines that women make up three-quarters of the local government workforce ‘but fill just 24 per cent of chief officer positions’, with the most significant barrier being the ‘nature of the organisation in which they work’. This identification of gender as ‘women’s issues’ means that gender equality for men and women is obscured. But it is not the only case study organisations that interpret gender to mean women.

Some 'best practice' organisations have identified equality champions. Brent Council's chief executive has even volunteered to be the 'gender equality champion,' to indicate that 'as well as formally putting gender equality on the diversity agenda, having such a senior man campaigning on this issue sent out strong signals to managers and employees in the authority about its importance' (Godwin, 2006a, p6). Goldman Sachs has devised specific 'gender diversity' goals that include measures such as driving leadership, increasing the number of senior female employees, women's networks, and improving processes that support women's career development (Godwin, 2006b, p15). And other organisations such as BP and Jaguar and Rover, with historical legacies of male dominated workforces have similar measures to enhance work-life balance policies for women (Foster, 2005; 2006). Whilst these organisations demonstrate a progressive agenda, the focus specifically on women implies that work-life balance policies are for women only.

That work-life balance policies are seen as beneficial and necessary for women was particularly evident in the public sector organisations. An equality and diversity advisor at the ALMO suggested that work-life balance policies were necessary, particularly if women were to progress through to senior management positions. Similar sentiments were expressed at the CGD.

'One of the things that I have noticed is that for female lawyers ... we are a much more attractive employer to people who were at the Bar, because you know the culture at the Bar is very macho – open all hours doing stuff, and the culture in large private legal firms is also – you know every half hour needs to be accounted for ... The way we work is much more conducive to balancing it with a family – for example for a female lawyer. And we are now offering very competitive salaries ... I think that now it's a very attractive place to work.' (CGD – senior manager, HR)

Whilst on the one hand, this has the potential to allow women to remain in good quality jobs, that are often perceived to be incompatible with family life, the danger is that work-life balance policies create a 'mommy track' – a defined trajectory that focuses on part-time work whilst mothers have young children, but where opportunities to progress to

senior levels in an organisation are not (necessarily) easily attainable (Ehrlich, 1989; Lundstrom, 1999). This raises concerns about the quality and career prospects of working less than full time. Many women may have a preference to work part-time when they have children, but that does not necessarily equate to a preference for career stagnation or downward trajectory.

Decisions about paid and unpaid work are often taken in the context of choices and constraints. Choices are determined by preferences in combination with the surrounding context, such as availability of work, pay, childcare options and household requirements (Crompton and Harris, 1998; McRae, 2003). The lack of affordable quality childcare in the UK (Daycare Trust, 2004), combined with the gendered division of labour and with the Government's drive towards full employment, creates a 'choice' of part-time work for many women with children. Whilst this may be the preference for some mothers, (e.g. Hakim, 1996; 2000), this is not everybody's ideal 'choice'. These choices must be contextualised within broader constraints. Decisions often reinforce traditional gender roles (Hardy, 2001), with further implications for pay and career progression. And care responsibilities (outside employment) are often under-valued. A more complex rebalancing of 'work' and 'life' is required.

Typecasting women into particular opportunities to progress within an organisation restricts opportunities for mothers, but also for men with caring responsibilities. It does not provide the flexibility that employees require throughout their careers. Charlesworth and Baird (2007) argue that by framing gender issues as women's issues, gender equity goals are marginalised and men's interests in work-life balance outcomes are often silenced. The attitudes portrayed in the case study organisations arguably reinforce gender stereotypes with a significant focus on mothers. Work-life balance policies are often conceptualised and implemented with this target group in mind.

A linked dimension relates to whether work-life balance policies were portrayed, or whether employees perceived work-life balance policies, as an entitlement (Chapter 4, see also Lewis, 1997; Lewis and Haas, 2005). Analysis of WERS 2004 data reveal that with the exception of home-working, women were more likely than men to believe that work-life options were for them (Nadeem and Metcalf, 2007). Case study data, particularly from more senior employees, suggested that any provision beyond statutory requirements should be considered as a bonus by employees; that they should be grateful that the organisation was providing it. The CGD had just started issuing benefits statements to their employees which, alongside outlining their salary and pension contributions, also described rewards, including work-life balance policies. Indeed, work-life balance policies are often presented as benefits in a company's literature when advertising for and recruiting potential applicants (McCall, 2005).

As organisations with extensive work-life balance provision are often identified as good places for women to work, this is in fact a gender issue. Web-sites and compilation lists identifying good places for women to work are widely accessible. For example, the web-site <http://www.wherewomenwanttowork.com> is a recruitment web-site primarily for women. Through *The Times*, an annual list is published outlining the 50 most progressive workplaces for women. A great amount of emphasis is placed on flexibility offered and the ability to combine work and family life (The Times, 2007). Again, these are targeted benefits for women and in particular mothers. Work-life balance policies are presented (and perceived to be) entitlements for women, which is problematic for the progression towards gender equality.

6.3.3 Gendered organisational culture

The organisational culture is a significant contributor to understanding barriers limiting the take-up of work-life balance policies. Broadly described as 'how we do things around here', organisational culture encompasses symbols, language, beliefs and values held by

and practised in an organisation (Newman, 1995, p11). Arguably these domains are gendered (Itzin and Newman, 1995), and therefore embody attitudes and norms in relation to policies such as work-life balance policies. Gender relations operate on explicit and implicit levels and contribute to the way that work is organised (Edwards and Wajcman, 2005).

In the three case study organisations – as with many other organisations – the overall organisational culture was arguably gender-neutral. Expectations and perceptions of working time demonstrate this. Working time is often associated with loyalty, commitment and productivity (e.g. Lewis, 2000; Thompson, Beauvis et al., 1999). And policies that simply reduce working hours are often perceived to be for employees who are less committed. The idea of ‘presenteeism’ – that presence is proportional to commitment, loyalty and productivity – marginalises those who are considered to be ‘atypical workers’. Although many respondents thought that ‘presenteeism’ was not as significant a problem as in years gone by, it still lingered, particularly in the CGD and ALMO. It implied that part-time workers – predominantly women – may be considered less committed and productive to the organisation.

‘There’s still a perception that you need to be here. Although senior managers are not saying that.’ (CGD – senior manager, HR)

The equality and diversity unit at the CGD had recently discussed how they could confront perceptions of ‘presenteeism’. Although flexible work arrangements were available, there were resource implications for the department’s budget and work that would at times be the responsibility of the employee rather than the employer.

‘Suppose I decided tomorrow that I wanted to work 10-4 – that could happen. I have no doubt that I would go to [my manager] and he would say “yes, of course” and we would change my contract and change my pay. What wouldn’t change is the expectation of how much work I would deliver.’ (CGD – equality and diversity advisor)

Conversations like these occurring in the equality and diversity unit were of particular concern, given that these employees were the experts and leaders in the area. Allowing

employees to reduce their hours, and reducing the employees' salary, but not reassigning their workload may be advantageous for companies. As Brandth and Kvande (2006a, p158) comment: 'the responsibility for getting the job done is each individual's, and if you are absent from work, no one else performs your tasks. Hence the best thing is to get the job done even if this means "invisible additional time"'. A reduction in hours and pay, does not necessarily equate to a reduction in workload. 'Presenteeism' at the FSC was perhaps more subtle. Like other aspects, there was a sense that there were no associated gendered consequences. It was an individual's decision and choice divorced from the organisational setting. The quote below was in the context of a discussion about why senior managers (in general) do not use formal work-life balance policies at the FSC. The comment answers the question it poses at the end; to have part-time senior managers is not achievable because there was an assumption that you need to be around to progress:

'I suppose the theory is if you wanted to get on then you perhaps need to be here and around to do that. I mean – I don't really see why there is any reason why if we wanted to have part-time senior managers or job share senior managers why that shouldn't be achievable.' (FSC – senior manager)

The notion of 'presenteeism' is at odds with the business case drivers of work-life balance policies that argue that wide provision enhances employee morale, retention and loyalty – which all these case studies acknowledged as central reasons for offering policies. If it is an individual's choice, but there are potential career implications, this limits the validity and accessibility of work-life balance policies to deliver for everyone.

6.3.4 The role and discretion of line managers

In all three organisational case studies, the role of line managers in implementing work-life balance policies generated much discussion. Common with the evidence in the published research, line managers were often responsible in the first instance for approving and rejecting applications from employees for specific work-life balance provision. Their autonomy and discretion were outlined in nearly every document related to work-life balance policies.

Line managers are often responsible for administering and implementing work-life balance policies, with support and guidance from HR when necessary. This responsibility again reflects a 'managing diversity' framework and is part of a wider shift in management towards a Human Resource Management (HRM) approach. HRM emerged from the US around the same time as diversity approaches, and advocates individually managing employees, with productivity and the business case as important components. Strategic integration, employee commitment, flexibility and quality are seen as the key dimensions to HRM implementation in the UK (Guest, 1987); and the performance of the individual employee is crucial. According to this, work-life balance policies with their emphasis on the individuals' productivity comfortably sit within the line manager's remit. Managers need to be convinced by the business case (Cornelius, Gooch et al., 2001; Liff and Cameron, 1997), for work-life balance policies and then agree to an individual's request.

The role of the line manager has gender dimensions in terms of the perceptions and expectations that managers have, related to eligibility for work-life balance policies. Yeandle, Phillips et al. (2003) identified that individual managers' perceptions and interpretations of family life pervaded decision-making on work-life balance policies. WERS 2004 reported that 69 per cent of private sector managers and 47 per cent of public sector management thought that it was up to the individual to balance their work and family responsibilities. Compared to female managers, male managers were more likely to believe that it was up to the individual to balance their work and family responsibilities, as were managers in organisations in which women did not comprise half the workforce compared to those in which women were the majority (Kersley, 2006). Managers' understandings of work-life balance being the responsibility of employees provide further evidence of a 'managing diversity' approach that is focused on the individual. The gap between managers and employees was reportedly wider in the

private sector organisations, or where organisations had a minority of employed women, or where basic HR policies were evident (Nadeem and Metcalf, 2007).

Interviews in the case study organisations highlighted some of these factors in further depth. For example, in response to a question about the relationship between diversity and work-life balance policies, one of the participants – a staff representative – recounted his experience of becoming a father. Before he became a father, he never really thought about work-life balance policies because he perceived that they were largely for women. However, upon becoming a father, although initially cautious, he requested a change to his working hours. When his application was accepted, he was ‘grateful’ because he had a ‘good’ manager who understood his situation. He added that his experience at the ALMO was more flexible compared to his previous private sector employer and he also noted that his manager was a woman. The role of the manager is perceived as a variable – managers can be ‘good’ or ‘bad’. And levels of managerial ‘buy-in’ to work-life balance policies differ. In addition, it suggests that perhaps the Government should consider additional legislation in the area of work-life balance, rather than encourage it as voluntary good practice. This experience also lends support to Lewis’ hypothesis of entitlement (Lewis, 1997) – that women perceive work-life balance policies to be for them – and the difficulties in challenging traditional notions of caring.

Throughout the interviews, the responsibilities of line managers for administering work-life balance policies generated immense debate about the quality of line managers and their increased management responsibilities. In a study focused on the role of line managers in implementing family-friendly employment policies, Yeandle, Phillips et al. (2003) found that there were progressive line managers, as well as those who were ‘vague’, ‘ignorant’ and ‘resistant’, in relation to the implementation of work-life balance policies. Research demonstrated that managers often ‘muddled through’ or ‘relied on common sense’. Managers were generally supportive of work-life balance policies, but

were often squeezed between administering human resources policies and ensuring business goals were being met.

This tension was highlighted at the CGD by senior managers, where it seems as though managers were being criticised for erring on the side of the employee.

'But it's like the issue has got out of kilter. And it may seem strange for the head of equality and diversity to be saying this, because often you'd be expecting them to be pushing the flexible working boundary. But it's not that we have necessarily gone too far with it, but some managers haven't got it right and they have interpreted that as an absolute staff right, as opposed to something that has to be a proportionate response that strikes the right balance between business needs and people.' (CGD – senior manager, equality and diversity)

'I think sometimes, some of our managers in the organisation in bending over backwards to offer flexible working practices ... actually have gone a little bit too far the other way ... you've got to balance the desires of the individual with the needs of the business ... Sometimes our managers are frightened to say no to anybody and that sometimes does cause trouble. Because we are trying to help them and support them ... Because we have got a business to run ... You know it would be nice to let them go and then you discover that half your team aren't here on Fridays.' (CGD – senior manager, HR)

These quotes point to a number of potential problems; perhaps the equality and diversity agenda had not been communicated effectively, or perhaps managers had not 'bought in' to the agenda. At the FSC managers seemed to have been convinced by the merits of the business case. There was explicit mention of the business case being the priority. A senior manager commented that some managers felt 'more comfortable' and had 'more experience' with managing employees' requests, and that this experience often translated into a better understanding of the potential benefits such as improved employee motivation. But this highlights the variation between managers. These excerpts are potentially in conflict with the organisation's commitment to provide everybody with the opportunity to take up working-life solutions.

'Definitely – I think that the manager is the only person who can make that decision. It's their area. And only they know what their area can sustain. If they have got a team of seven and six of them are working part time and there is a new person coming in, well you couldn't really justify that person going part time if they need full-time cover.' (FSC – HR)

'The first thing that I would do from a selfish point is how would it benefit me and the business. Obviously managers have a lot of responsibility and therefore need to "buy in" to work-life balance.' (FSC – staff representative and manager)

Compared to the CGD, the primacy of the business case is not questioned at the FSC. Whilst it is not clear why this is the case, it is possible to speculate that this may be related to the less articulate connections between equality, diversity and work-life balance at the FSC compared to the CGD (Chapter 5). This business case is the explicit driver at the FSC, whereas social and moral considerations are more evident at the CGD (and ALMO).

Of course there was variety in the quality of line managers, the rapport that existed between managers and employees and the level of autonomy that different line managers had in each organisation. A lack of training and support of managers was also identified by all three organisations. In addition, and perhaps more important for the implementation of work-life balance policies, was the impact that these discrepancies have on eligibility for, and availability of policies, in particular policies that alter working hours.

6.3.5 Eligibility

Data generated from the interviews raised many issues related to eligibility. Nearly every participant made clear that work-life balance policies such as flexible working and part-time arrangements were available to all employees (subject to business requirements). But when probed further, differences emerged and eligibility was restricted. The way that requests were administered by managers was an issue for some respondents, who commented on different approaches taken by different managers. In these case study organisations, it was clear there was confusion about what policies were offered and about their availability. From this, it was likely that many other staff members were confused about what may be available to them. Throughout the interviews, there were underlying assumptions and expectations that work-life balance policies were largely

about family responsibilities. This affected perceptions of eligibility, again highlighting the difficulties in genuinely providing universal provision for some work-life balance policies, particularly in light of competing business needs.

'I think that perhaps diversity issues aren't taken into account sometimes ... I mean again it's back to the old example of a lot of my network (LGTB) members don't have children, so therefore it's assumed that because they don't have children they don't have families ... Well actually someone could have a partner who is disabled, who may need care every afternoon ... That sort of stuff isn't taken so much into account ...' (CGD – staff representative)

The needs of parents can be perceived to be more legitimate. Tackling the issue of eligibility can lead to a backlash against parents who have long been the prime recipients of work-life balance policies (Shanahan, 2005). The issue of eligibility raises tensions about how managers and organisations should prioritise; and therefore between the 'work-life' and 'work-family' agendas.

'Work-life balance to me covers a broad umbrella of things and I think unfortunately, in particular as it comes into the equality arena, it is seen as something that is only applicable to people with children and usually women. So there's this whole perception of what work-life balance is, but the real issue is that everyone needs work-life balance and everybody benefits from it. And I think it's very unfortunate that it's been packaged in the way that it has whether intentionally or unintentionally.' (CGD – equality and diversity advisor)

Whilst reconciling this tension is beyond the scope of this research, separating leave provision (such as paternity, maternity, parental, adoption and carer) for parents and carers on the one hand, and temporal and spatial flexibility and career breaks on the other, may begin to mitigate potential backlash. Thus far there is no reported backlash in any of the participating case study organisations, although there are murmurs, particularly from people who have had requests rejected. For example, in one of the case study organisations, a participant had heard of employees who had annual leave requests rejected over Christmas because they were not parents. Whilst annual leave is not about work-life balance policies *per se*, it does raise wider questions about how to prioritise requests – particularly for universal provision. Recognising this as a potential growing concern, the ALMO's working group on retention is starting to consider requests beyond those of parents. **The FSC with its commitment to working-life solutions for**

everyone considered that they had resolved these issues ‘because the policy is available for everybody, we make no distinctions about whether you are a parent or not’ (*FSC – senior manager, HR*).

However, the assertion that work-life balance policies are for everyone was challenged within the case study organisations. A senior manager at the FSC mentioned that recently his team had been dealing with a perception of ‘first come, first served’ – that work-life balance policies were fixed, and that once an arrangement had been granted, it was perceived that no-one else could have a similar arrangement. In response, he had convened a team meeting to discuss creative ways around this, such as merging different teams so that a broader range of skills were available to provide more cover and enhanced flexibility. This same concern was raised at the CGD about how priorities were decided and by whom. For example, many employees had requested Friday off for a variety of reasons. Does a parent with a disabled child have priority, or someone with religious beliefs, or someone who wants a long weekend? Making the case dependent on business needs does not necessarily help resolve this tension. The lack of in-depth understanding of diversity is somewhat exposed through these examples. In addition, it potentially exposes the lack of understanding associated with the term ‘work-life balance’ – which, as described in Chapter 4, was a way in which the Government sought to extend ‘buy-in’ beyond parents.

Further limitations in terms of eligibility resulted from policies often being administered in an ad-hoc manner. Although each organisation had specific policies and procedures, they were not always known or followed. As already discussed, utilisation of work-life balance policies is unequally distributed throughout society, with higher rates of utilisation from (working) mothers with full-time working partners. In addition, utilisation of work-life balance policies is also distributed unevenly throughout the job hierarchy at the same workplace (Hogarth, Hasluck et al., 2001). Whilst the majority of workplaces

provide opportunities to take-up work-life balance policies, availability can be limited in practice (Kersley, Alpin et al., 2005; Woodland, NatCen et al., 2003). Respondents commented that the ability to reduce working hours was limited in practice. In particular, tensions emerged at junior and senior levels. Despite many policies that aspire to be universal, there were levels with more and less access and availability. Eligibility often corresponded with gender.

Senior managers (many of whom were men) seemed to have more informal flexibility and thus more autonomy over their working time. This excerpt from a senior manager illustrated the flexibility that was accepted at the FSC:

'I think that the use of it tends to be more informal ... if I want to go out for a run, then I let my team know and I go out for a run. You know, I am selling my house at the moment so if I need to go and do something, then I let my team know and then go and do it. I think that from a senior management perspective – it tends to be more that you use it on an informal basis – because there will be times when you are expected to do a little bit more and I think that you are entitled to take a bit back.' (FSC – senior manager)

Senior employees are often afforded the autonomy to be able to manage their own time.

A different picture emerged for those who were being 'managed'.

'So sometimes if you look at it from an equality basis – things like flexi-time and working from home actually have the opposite effect. They create barriers rather than bring them down ... Manual workers don't get flexi-time. I can't say that I usually start at 8, but I have to go to the doctors, so can I start at 9 and make it up at the end of the day?' (ALMO – union representative)

This inequitable access to flexibility contributes to the understanding that flexibility should be considered a bonus. A 'managing diversity' framework should be able to deliver both increased productivity for the employer and more autonomy over time for the employee. However, underlying notions of social inequalities contribute to understandings of the different options available to employees through the job hierarchy. The increased polarisation of 'lousy jobs' (low-paying service sector) and 'lovely jobs' (professional and managerial jobs) (Goos and Manning, 2003) has a significant impact on women. And the business case, with its focus on retaining skills, knowledge and experience, has different meanings to employers; a stronger business case exists for high-income professionals

compared to less-skilled workers, where the case is weakened by a replaceable set of skills and people being more easily expendable (Dean, 2007). Occupational class also affects the decisions that people make (Crompton and Brockmann, 2006). Parents in lower socio-economic groups are more likely to work at atypical times for a variety of reasons that may include the ability to reduce childcare costs by parenting in shifts (La Valle, 2002). Through the case studies, these differences in eligibility translated partly into a tension between customer-facing staff and management / administrative staff. This tension between groups of employees also often corresponds to whether an employee's workload is proactive or responsive. Many junior posts – dominated by female staff – in these case study organisations were customer facing, whereas senior jobs – dominated by male employees – tended not to be.

'I think that it's easier for people who work at the centre of the organisation to have the flexibility rather than people who work on the front line. No, not in the front line but in the offices delivering services directly to the public... I also think that it's more difficult if your work is more reactive than proactive. Because if your work is much more based on what comes through the door or answering the phone ... then you can't plan it in the same way. Whereas if your work tends to be proactive, you can organise your work to deal with peaks and troughs – I think that it's much easier to do it that way.' (ALMO – senior manager)

The right of an employer to reject a flexible working request is protected by legislation. But the degree of flexibility and the variation in interpretation differs widely through organisations.

6.3.6 Monitoring and evaluation

These case studies were conducted in a broader organisational context that lacked robust monitoring and evaluation procedures.

'I don't think that at the moment we specifically evaluate. However the only way to evaluate is to be seeing the take up of the various initiatives and maybe making it more structured. And perhaps that will be a recommendation from the consultant – that every financial year we evaluate to see how many people have taken up the various strands of the initiatives.' (ALMO – HR)

Few data are collected on take-up of work-life balance policies, although the ALMO conducts a staff attitudes survey. The 2006 staff survey explored several dimensions

associated with working for the ALMO such as job satisfaction, motivation, evaluating induction periods, learning and development, equality and work-life balance. The narrative in the annual report highlighted some of the gaps that were explored throughout the interviews, 71 per cent of staff who responded (the response rate was 62 per cent)⁶² reported that they were able to balance their work and personal life. Half of these considered that the ALMO helped them to achieve this. Senior and middle managers felt least able to achieve a good work-life balance, with younger and more junior staff better able to do so. In addition, middle managers did not feel that the organisation supported them in balancing their work and life. Employees suggested that the organisation would benefit from assessing what additional policies would be valuable – but there was no detail documented in the report on what type of policies this might mean. It also did not provide a framework in which data could continue to be developed and used in a way to comprehensively understand and implement an equality framework.

'What you don't ever know from those (annual) reports is who applies to go part time and that's where the real equalities issues lie.' (CGD – equality and diversity advisor)

'[We] need to do more evaluation because the mix isn't right. (Work-life balance) policies were designed for traditional work patterns.' (CGD – senior manager, HR)

Many organisations lack robust monitoring procedures, detracting from an understanding of what their policies could actually deliver for their employees.

6.4 Conclusion: 'Gender-blind' to varying degrees

It was the extent to which the organisations were 'gender-blind' (Smithson and Stokoe, 2005) – where gender-neutral terms such as 'work-life balance' and 'flexible working' were used, but have embedded gendered assumptions and associations – that was most significant. There was an inherent contradiction in these organisations – on the one hand, there was virtually no acknowledged link between the lack of representation of

⁶² Note that response rates were lower from employees in junior positions and the data is not weighted.

women in senior management and gender issues, but on the other hand work-life balance policies were mostly targeted towards women.

'Everyone can progress through – career progression frameworks that are relevant to their role – part time, full time, whatever. In line with their abilities and to some extent obviously their working hours. Their ability to develop may be influenced by that. It's very open and we wouldn't want anyone to think that their access to training, development or progression was restricted simply because they were female or part time or something else like that.' (FSC – senior manager, HR)

'I honestly couldn't tell you if we have got a gender policy or not ... because my team managers have the discretion to employ who they want to and how they want to, if they want to have a green man from Mars with one leg – if they think that's right to get that job done – then it's fine. I am not aware that there is a policy so equally I have not come into any situations where people consider that they have been treated fairly or unfairly because they are male or female.' (FSC – senior manager)

These examples from the FSC are not unique and are representative of the other case study organisations in relation to work-life balance policies being perceived as 'women's issues'. A couple of the participants captured some of the difficulties and commented on the constraining organisational culture as an obstacle to career progression.

'I think that it's difficult to create diversity and then a diverse organisation, because there's too much pressure to work in a particular way ... people go around and say, why aren't there more women at senior levels in the organisation, and I don't think that they recognise that a lot of women don't want to be at that senior level because they feel, "gosh – if I'm at the senior level of the organisation and I have got a family, then my family is going to go to the wall". I do think ... and there is still that pressure to work in a particular way, to work long hours. And to be seen to be working long hours is seen to be a sign of commitment to the organisation. And then that creates problems I think, because if you can't do it, you can't do it.' (ALMO – senior manager)

There was a bottleneck in all three case study organisations, in that women were clustered in the lower and middle ranks. In some cases participants were resigned to the fact that their workforce profile reflected workforce data more broadly and so felt that there was not much that could be done. Alongside traditional gender stereotypes, the workforce profiles (Tables 5.1-5.3) of these organisations indicated notions of 'workers' and 'carers' – cementing the one and a half breadwinner model that is common in the UK. However, there are also indications (particularly in the public sector) that attitudes are starting to change – albeit very slowly.

'We've got a lot more ... a more diverse workforce than we have ever had and people's expectations are different. People want ... they are demanding more in terms of work-life balance and it's not usually up to women who have children or families or caring responsibilities, who are deemed to be the ones who are most likely to want suitable work-life balance – it's not that at all these days. You know, men too are demanding that they have appropriate time – they want to take more of an interest in their families' caring provision and it's very good, because the (organisation) has had to move with that demand to change our approach.' (CGD – senior manager, HR)

The conceptualisation and implementation of work-life balance policies do not yet reflect these changing needs. A perception of an 'ideal worker' based on a traditional male model of work still exists to varying degrees, with attributes such as long working hours emphasised. 'Presenteeism' and the idea that you had to be there to progress were demonstrative of this.

'Gender is such a difficult thing here because in theory we look good – we're about 66-67 per cent women. We do now have more women in the senior ranks than we did before, but how much those women are allowed to operate as who they are, I don't know. They may be able to operate as who they are, but you are not seeing a place where ... if you were looking at typical male and female ways of operating - so whether you tried to resist it or not, in fact women do tend to operate differently from men and if you look at the senior practices, the practices that are valued are male practices. So we do have women in those roles, but they are not necessarily operating in the way that they most might want to ... Certainly lower down it's very much "girls in the office" and it's very typical ... it's what do you do? You don't just go that we've got two black women who are [in senior management] and we've got three white women and all the rest are men, but we've got them. But that's not the issue. The issue is it's not just getting people, it's about people being allowed to operate and be valued in the same way...' (CGD – equality and diversity advisor)

The gendered organisation culture was limiting for both men and women. Work-life balance policies set in this context have gender implications that limit the ability of men and women to make genuine choices about work and care. The individual employee is assumed to be gender-neutral, with few recognised constraints – organisational or otherwise. Locating these policies within the context of 'managing diversity' supports and facilitates women's employment, but does not challenge fundamental gender disparities such as occupational segregation (horizontal and vertical) and gender pay gaps. The constraints resulting from defining diversity primarily as 'managing diversity' (Chapters 2 and 4) limit the ability of these policies to progress gender equality. Traditional stereotypes of 'men' and 'women' exist in the workplace and the current package of

policies does not allow for the range of requirements that people have, want and need as 'workers' and 'carers'.

7.0 EQUALITY AND DIVERSITY: GENDER DIMENSIONS OF WORK-LIFE BALANCE – DISCUSSION AND CONCLUSIONS

7.1 Introduction

This thesis has explored the gender dimensions of work-life balance policies in the UK.

This final chapter reviews the thesis. The chapter begins by restating the research objectives, and the key stages in the research process. It then presents and discusses some of the main findings from the research, with broader policy implications being drawn from the wider literature. Finally future research possibilities are identified.

7.2 Reviewing the thesis

Through exploring published literature, analysing government documents and conducting three organisational case studies, this thesis has addressed three related research questions: firstly, to what extent are work-life balance policies framed by ‘diversity’; secondly, how does this impact on the conceptualisation and implementation of work-life balance policies (in government and in organisations); and thirdly, what are the implications for gender equality? In considering these linked questions, this thesis makes an original contribution to the literature on gender and work-life balance policies in the UK by offering new insight into how organisations are conceptualising and implementing their work-life balance agendas given the changing equalities framework.

Work-life balance policies are topical in that they respond to multiple demographic, social and workplace challenges. The first chapter established the broader context for this study. Labour’s electoral victory in 1997 was presented as offering a ripe political landscape in which to address inequalities, and linked social justice objectives to the economic context. Throughout the 1980s and 1990s, the workforce and workplace had altered. The complex mix of women’s labour market participation rates increasing, a high concentration of mothers working part-time, men’s labour market participation rates

decreasing, the decline of the manufacturing sector and the growth of the service sector had all contributed to changing the nature of work, in a more competitive global market. These changes were both caused by, and influenced, the transition from the male breadwinner / female carer model to the adult worker model, which assumes an individual who is active in paid employment. This shift, towards an adult worker model has also influenced the UK Government in striving to reach the EU's employment targets. The adult worker model, however, is problematic when viewed through a gender lens, as the relationship between paid and unpaid 'work' is not adequately considered. As work-life balance policies are promoted as strategies that facilitate employment – particularly for women – as well as providing opportunities to help everyone juggle their multiple responsibilities, they have a role in supporting (or not supporting) progress towards gender equality.

The second chapter outlined the emergence of the diversity discourse in theory, policy formulation and organisational implementation. The relationship between equality and diversity was considered, and in particular the potential offered by the feminist literature on these topics to overcome the 'same-difference' dichotomy and thereby progress genuine gender equality. It was argued that the theoretical foundations of diversity offered scope to recognise intersecting and multiple aspects of identity, and to acknowledge that 'men' and 'women' were not homogeneous categories. This type of diversity could promote the relational and interdependent aspects of gender, and may be able to offer genuine choices to men and women to work and care. However, this theoretical potential was not necessarily reflected in practice. The components that shaped diversity in practice were presented in order to gain an understanding of the specific dimensions of the diversity discourse in the UK. Through consideration of the UK-EU equality trajectory and an expanding equality agenda, as well as the focus on employment (influenced by the EU and US), it became clear that the 'managing diversity' discourse had emerged as dominant. The relationship between gender, work and

organisations was also discussed as a way of analysing whether a diversity approach had provided genuine opportunities to translate the theoretical potential of diversity into practical policies for organisations. With the emphasis on the individual worker and on choice, 'managing diversity' has a significant effect on how work-life balance policies have been conceptualised and implemented in both government policy and organisations.

The research methodology was outlined in Chapter 3, linking the theoretical underpinnings of the study to the primary research. The research core included analysing government policy documents and undertaking organisational case studies, to illustrate how the government conceptualises work-life balance policies and how organisations interpret the work-life balance agenda. The benefits and shortcomings of the chosen research methodology were explored. In each of the case study organisations, qualitative interviews with key equality stakeholders were conducted, complemented by an analysis of relevant equality, diversity and work-life balance documents. Literature reviews of the development of diversity through the equalities discourse (Chapter 2) and the evolving work-life balance narrative (Chapter 4) were also key components of the research process.

Chapter 4 explored the specific UK work-life balance context. Firstly, the terminology of work-life balance was considered in explaining how and why it is the most commonly used term in the UK. Tensions between the agenda being for everyone and targeted towards parents emerged as a critical issue. And questions about what is supposed to be 'balanced' were also raised. The second part of the chapter considered the UK Government's approach to work-life balance policies. The purpose of this documentary analysis was to understand the priorities, tensions, contradictions, benefits and shortcomings of the agenda that was presented to employers and employees. The 'managing diversity' context was prominent in how the Government encouraged work-life

balance policies. Parental choice and an individual focus were issues that emerged, alongside competing government policy priorities. The conceptualisation of the work-life balance agenda set the foundations for the organisational case studies.

Chapters 5 and 6 presented and analysed data collected through organisational case studies. Chapter 5 focused specifically on the equality and diversity remit in each of the case study organisations and its implications for gender equality. In each of the participating organisations, work-life balance policies were located within the organisation's diversity remit. The emphasis on 'managing diversity' and the business case meant that the theoretical potential offered by diversity, for example to address multiple aspects of identity, was not effectively harnessed. On the one hand, each of the case study organisations – particularly in the two public sector case studies – presented a sophisticated equality and diversity agenda. But on the other hand, significant gender workforce disparities existed. Women were concentrated in the lower and middle ranks in each of the participating case studies and men dominated the senior grades in each organisation; and part-time work rates were disproportionately female. Although the equality agenda was actively promoted, it was essentially disconnected from these gender disparities and their implications. The case study organisations exhibited characteristics that limited their capacity to recognise organisational barriers, which consequently limited the ability to progress gender equality aims.

Chapter 6 focused on the work-life balance agenda offered in each of the case study organisations. Each of the case study organisations had responded to the Government's call for employers to capitalise on the benefits of a work-life balance agenda, underpinned by the business case. Recruitment and retention – critical business case drivers – provided the impetus for much of the work-life balance agenda in the case study organisations. Despite creative and progressive work-life balance frameworks, tensions were again raised between whether the work-life balance agenda was for all

employees or just parents. In each of the case study organisations, work-life balance policies had largely been considered 'women's issues'. Combined with a gendered occupational culture that retains notions of 'presenteeism', this detracted from the organisation's ability to progress equality. Eligibility criteria (such as occupational grade), and the discretion and autonomy of line managers were additional factors that contributed to work-life balance policies being gendered in practice. These case study organisations were exposed as being 'gender-blind' to varying degrees, lacking gender awareness. The emphasis on 'managing diversity' and the business case has arguably exacerbated this lack of gender awareness.

7.3 Findings and discussion

In this conclusion I have identified three themes to address the research questions set out in the introduction. Although the themes are cross-cutting, each primarily answers a specific research question. The findings draw on the theoretical literature, published literature, as well as the primary research undertaken for this research. The first theme of how 'managing diversity' and the business case shape the work-life balance agenda responds to the first research question on the extent to which work-life balance policies are framed by a diversity approach. The second theme of examining the tensions between work-life and work-family agendas emerges from the second research question. It examines how the government and organisations have approached diversity in practice, and in particular how this has shaped an approach and framework towards work-life balance policies. Finally in answering the third research question and drawing out implications for gender equality, exploring the choices that women and men have to choose to work and care – which underpins progress towards gender equality – is critical.

7.3.1 *'Managing diversity' and the business case: Shaping the work-life balance agenda*

Different interpretations and understandings of diversity contribute to defining the remit of the work-life balance agenda in the UK (Chapter 2). It was argued that the potential offered by diversity – as framed by the feminist literature – offered scope to progress gender equality through overcoming the 'same-difference' dichotomy that often limits progress, by recognising and addressing different aspects of identity and how they may intersect (Squires, 1999). However, this potential was not necessarily realised through the case study organisations in application.

The UK's diversity discourse is shaped by a specific combination of influences. The UK-EU relationship is a key influence – in particular through the trajectory of gender equality in the EU, an expanding equalities remit and the strong focus on increasing labour market participation. The EU has long pursued aims of gender equality, primarily through approaches based on equal treatment (Hoskyns, 1996). In the mid-1990s, gender mainstreaming emerged onto the agenda with the aim of applying a gender perspective to all policies and processes (Rees, 1998). Gender mainstreaming approaches recognised that policies based on either gender sameness or difference were limited, and attempted to transcend this limitation. Thus far, gender mainstreaming has not succeeded, due to numerous factors that include a lack of commitment, resources and expertise (Mazey, 2000). The approach is still largely defined as a 'women's issue', therefore lacking a genuine consideration of gender for both men and women. And the perennial criticism that the EU's narrow economic focus limits the effectiveness of any potential gender approach also holds true in this instance.

Article 13 of the Treaty of Amsterdam (1997) expanded the scope of equality in the EU and required member states to 'take appropriate action' in order to pursue equality objectives. This expanding equalities remit highlights another significant dimension that has influenced the nature of UK diversity approaches. The recent establishment of the

Equality and Human Rights Commission (EHRC), guided by EU legislation, represents a shift towards diversity in that there is recognition of a broadening equality agenda and scope to understand more complex issues such as intersecting inequalities. The EHRC's vision offers the potential to the UK's equality discourse of promoting diversity (EHRC, 2007). Despite this optimistic vision, there are unresolved tensions between the group and individual, and between different equality strands, that have impaired the ability of the EHRC to be effective thus far in promoting its objectives. The EHRC is still in its early operational phase and may need some time to embed and operationalise its strategic vision and direction. However, ambiguity and confusion around current definitions of equality and diversity compound scepticism that the EHRC will be able to effectively address and progress the equalities agenda. Despite a definition of equality that promotes a capabilities approach (Equalities Review, 2007; Sen, 1992; 1999) representing a focus on augmenting what a person is able to do or to be – the EHRC does not (yet) offer any genuine progress in terms of equality. Specific concerns for gender equality are that without an understanding of cross-cutting inequalities, gender equality goals may be diluted.

A third dimension that has been critical in shaping the diversity discourse in the UK has been the focus on employment, in particular through the EU's European Employment Strategy (EES). Work-life balance policies are considered necessary to achieve EES employment targets, particularly for women. Similar to the EU, in the UK policies have prioritised facilitating women's employment – through an emphasis on flexible working and increasing childcare provision – in preference to a focus on men and women sharing caring responsibilities (Lewis, 2006). This narrow focus on labour market participation rates has meant that arguably substantive gender equality issues have been demoted, and visibility towards gender equality has declined particularly as specific gender guidelines and the equal opportunities pillar were removed from the EES (EC, 2008; Rubery, Grimshaw et al., 2003). With the EU as a whole (and some member states)

struggling to meet its employment targets, it would seem that facilitating employment will remain the central priority, and that gender mainstreaming examples will need to be better integrated into the EES guidelines if genuine progress towards gender equality is to be made (EC, 2008).

Linked to this emphasis on employment has been the influence of the HR discourse. Drawing on socio-political changes in the US in the 1980s and 1990s, such as, changing workforce demographics, and neo-liberalism, the US influence of 'managing diversity' has encouraged employees to harness the potential of each individual. This type of diversity was considered to be positive, dynamic and less controversial compared to affirmative action policies (which were legal in the US context). The dimensions that prevailed in the UK were a focus on the individual, devolution of responsibility of HR practices to line managers, and the visible association between enhancing diversity of the workforce to increasing productivity.

The resultant diversity discourse in the UK is 'managing diversity', which emphasises the business case and the ability to harness the potential of each individual. This is an important aspect forming the premise upon which work-life balance policies are founded. The business case drivers for the 'managing diversity' discourse and the work-life balance agenda are similar in that they focus on recruitment, retention, enhancing employee commitment, widening a (potential) customer base, and increasing productivity (DfEE, Scotland Office et al., 2000; DTI, 2004a; Jones, 2006). The business case stands out as the central driver for equality, diversity and work-life balance across the organisational case studies.

Each of the organisational case studies inextricably linked work-life balance policies to their equality and diversity agendas. The business case underpinned the agenda and linked work-life balance policies to enhanced productivity. At the FSC the drivers for the

areas of equality, diversity, and work-life balance were identical, and focused almost exclusively on recruitment and retention. Equality specialists at the CGD and ALMO, as well as linking equality, diversity and work-life balance policies together also articulated moral and social objectives alongside business case objectives. This more nuanced agenda at the CGD and ALMO corresponded to a greater awareness of equality and diversity.

Influences from central government and local government are recognised as external influences, but these organisations had also established an equalities infrastructure that included an advisor at the ALMO and a stand-alone equality and diversity unit at the CGD. The FSC was less reflective, which could be partly because of its position as a private sector organisation, which can lag behind the public sector; its lack of equality specialists; and / or perhaps because it did not perceive there to be any genuine equality issues. In response to questions about organisational inequalities, the FSC participants answered that no equality issues existed, whereas some of the ALMO and CGD participants acknowledged aspects of inequalities throughout the organisation. All three of the organisations' workforces were segregated by gender (Chapter 5). Prioritising economic drivers for equality over social motivations potentially distances understandings of diversity away from notions of equality (Newman and Williams, 1995). At the FSC this was most pronounced. As a result, based on these case study organisations, public sector organisations were more likely to have an equalities infrastructure which led to the articulation of a more sophisticated equality agenda.

The equality agenda in each of these organisations was firmly committed to a diversity approach. Some diversity policies are equal opportunities relabelled (Hoque and Noon, 2004), whilst others subscribe to notions of equal opportunities based on difference. Despite the benefits offered by a diversity discourse, such as a dynamic and progressive approach towards employment, the reliance on an interpretation of diversity that

emphasises the human resource implications is problematic for the pursuit of gender equality. The HR emphasis was most noticeable at the FSC, where equality and diversity were part of the HR department's remit. Interestingly, it was the FSC which had the lowest levels of equality and diversity awareness in comparison to the other two case study organisations.

Research generated from the case study organisations also highlighted contradictions in their equality and diversity agendas. These tensions were most evident at the CGD and ALMO. Conceptualisations of equality and diversity – with aspirations of equality for all – were not matched to the reality of how these policies were understood and interpreted. The equality agenda offered to protect an expanded range of groups from discrimination. But very few of the participants in the case studies seemed to have a comprehensive understanding of equality and / or diversity. In addition equality goals were often ambiguous. In the case of gender equality – which was articulated as a goal in all the participating organisations – an awareness and understanding of gender equality was rarely articulated. And although targets had been established, they were generally seen as the end-goal, focused on increasing women's representation in senior grades, rather than part of a broader strategy to address change. And no cross-sectional data were collected, even though a need was identified. The type of diversity that was proposed was articulated as dynamic on the one hand, but on the other hand largely reflected equal opportunities approaches based on equal treatment, with some programmes for action for particular groups. In this formulation, the equality approaches could not realise the theoretical potential to promote gender equality. As these organisations were examples of progressive organisations, this raises wider concerns about how other organisations may be grappling with these similar issues.

'Managing diversity' as an underpinning aspect of the work-life balance narrative was problematic for the case study organisations in the pursuit of gender equality, as

structured gender disparities – such as labour market inequalities – were often overlooked. Gender equality is not always an explicit aim of the business case; it is often incidental (OECD, 2007). And the resulting policies that emerged in the case study organisations were often used as mechanisms to facilitate women's employment. For example, entitlements to part-time working and flexible working were often perceived to be for mothers to enhance their employment. As long as the business case is narrowly defined, it will seemingly continue to promote part-time work opportunities for mothers, which as already discussed lead some women down a 'mommy track', with potentially wider consequences of downward career trajectory and pay penalties (Chapters 4 and 6). Notably, the FSC had the highest rates of part-time employment and the highest concentration of women working in the lowest grades (Chapter 5). Whilst for some mothers this may satisfy a preference for part-time work with decreased responsibility at a particular point in time (e.g. Hakim, 1996; 2000), this is not everybody's ideal 'choice'. It not only constrains choices for many women (Crompton and Harris, 1998; McRae, 2003), but also potentially wastes resources given women's increasing educational achievements. This possible waste seems to be at odds with the business case. If the business case is going to continue to be the preferred strategy to encourage businesses to adopt work-life balance policies for everyone (DfEE, Scotland Office et al., 2000), it needs to be more nuanced to account for other changes to working patterns and recognise the different working patterns that employees may have, and how they may be accommodated. Walby (2007, p2) links gender equality more widely to the UK's economic productivity, arguing that gender equality goals need to become less inhibited: 'If women's potential contribution to employment is held back then productivity suffers ... Decreasing gender inequality will increase the productivity of the British economy.'

The Government presents a strong argument that the business case is necessary for organisations to progress their work-life balance agenda and enhance their productivity (DfES, 2000). These organisational case studies have responded to this call, and as a

result have progressive work-life balance agendas. However, the promotion of the business case – although with the rhetoric of being for everyone – does not have any accompanying legislation. With similar foundations to ‘managing diversity’, the business case is not an effective strategy to look beyond the individual and towards structural barriers. Other contradictions, such as the tension between the work-life balance and work-family agenda, have also emerged. The business case does not necessarily provide a framework to strive towards wider goals such as gender equality.

7.3.2 *Work-family or work-life: Mutually exclusive or part of the same agenda?*

Identified as a core tension within work-life balance policies, as well as government and organisational frameworks, is whether the agenda should be targeted towards families (and others with care responsibilities), or whether it should be for everyone. This tension is evident throughout the literature around the evolving terminology, and in government documents and accompanying legislation. Data from the organisational case studies demonstrated that this tension was also evident, firstly in the way that policies were conceptualised and secondly how they were implemented, for example in how managers prioritised employee requests.

This distinction between work-family and work-life does not necessarily have to be presented as a discrete choice, as they are not necessarily separate agendas.

Regardless of parental or caring status, everyone has other responsibilities outside work. Of course there are differences between caring responsibilities and hobbies; but there are also differences in the flexibility that people require and what organisations may be able to offer their employees. In many cases, people may not even want to reduce their working hours; they may just want to modify them and have more autonomy and control over them (Jackson, 2007).

A life-cycle approach, acknowledging that different types of balance are required at different life stages, could begin to reconfigure the narrative of work-life balance to be responsive to people in different situations (Fagan, Hegewisch et al., 2006; Williams and Jones, 2005). Taking a holistic view of life beyond one specific event (Anxo and Boulin, 2006), a life-cycle approach has the necessary depth to recognise changes over time. The literature presented throughout the research shows that indeed different people have different needs over the life course. This affects their ability and willingness to engage in paid work. For example, Chapter 1 highlighted the differences in working patterns for men and women by age, suggesting that flexible work options may be advantageous for people at different stages in their career, for example older workers may want to explore flexible work options. Further evidence in Chapter 1 showed the differences in working patterns for parents – by sex and also by age of youngest child. And other evidence (in Chapters 2 and 4) showed that women from different ethnic groups have different rates and patterns of employment (Dale, Lindley et al., 2006). Combined, these data demonstrate that a range of working options may benefit employers and employees. The work-life balance narrative in the UK does not yet recognise the porous boundaries between ‘work’ and ‘life’, and how they may change over time (Fagan, Hegewisch et al., 2006; Pocock, Skinner et al., 2007a). The EU narrative of ‘reconciling’ work and private life is attempting to recognise a broader context by supporting the needs of citizens through their life cycle, for example by offering more care services (for children and the elderly), and tax incentives (EC, 2007, p5). Perhaps this is paving the way for a distinction between people with caring responsibilities and everyone. Everyone would have flexibility in their working hours, and carers could have more access to flexibility through leave provisions.

The term, work-life balance – which incorporates notions of flexibility and family-friendliness – is meant to symbolise a shift, that everyone should have the opportunity to balance work and other responsibilities. But the interpretation of flexibility has not

necessarily evolved accordingly. The EOC's *Transformation of Work* report (EOC, 2007a) argued that a 'third evolution' of flexibility is required to bring about increased job satisfaction and enhanced productivity, as well as more autonomy and control for workers. The first generation of flexibility had introduced part-time work options for women (who had caring responsibilities); and the second had challenged the temporal boundaries of working typical working hours, 9-5 Monday to Friday, recognising that many people were working 'atypical' hours. A third generation is now required where working time and place need to be addressed. As outlined in Chapter 1, the EOC advocated a concept of flexibility that is for everyone and aimed at addressing spatial and temporal flexibility across an individual's lifetime (EOC, 2007a). This would involve changes in management structures to focus on outputs and trust rather than the culture of 'presenteesim' that still lingers, as evident in the case study organisations. The business case is still used as a lever and as a way to remain competitive in a global competitive environment, but the added dimensions of autonomy and control may be able to offer more balanced flexibility.

Extending the right to request flexible working at the FSC was an example of how an organisation is attempting to offer its employees more flexibility. Although the right to request flexible working was extended to all employees, the underlying perception was that it was only mothers who would use this provision, as it was mothers who often felt 'entitled' to flexible working. This extended eligibility for one work-life balance policy was set within a wider context that often made small adjustments, such as negotiating modifications in working hours difficult for many employees at lower grades of the organisations who were customer facing. This was in contrast to informal flexibility and autonomy that seemingly existed at more senior grades. A further problem identified was how managers should prioritise employees' requests. Whilst the business case is considered paramount, what criteria should managers use to make decisions? At the CGD, parents seemed to be prioritised in the allocation of leave, and at the FSC there

was a perception that work arrangements were based on a 'first-come first-served' basis. This premise has the potential to create a backlash against parents. It seemed as though the case study organisations had not yet capitalised on the wider definition of flexibility described above.

The documentary analysis of the Government's agenda in Chapter 4 suggested that the term work-life balance was a mechanism deliberately used by parts of the Government to generate wider support from business to support the agenda (Campbell, 2006). By shifting the focus away from perceived family or women's issues, work-life balance was meant to encourage employers to think more creatively about all their employees, rather than just parents. Different government departments have also emphasised different aspects; for example, BERR (formally the DTI) has been encouraging businesses to adopt work-life balance policies for everyone, whilst the Home Office and Treasury seem more intent on supporting families. The rhetoric of work-life balance policies has been universal, but policy provision has been targeted towards parents and more recently carers.

A more fluid approach that recognises changes over the life course for men and women could prove to be more effective in considering policy responses. It would firstly highlight that a wide range of people have a variety of needs. Extending the right to request flexible working to carers is significant in that it recognises that carers may require flexible working. The extension of this right also goes some way in publicly recognising that the number of carers is likely to continue to rise given demographic patterns of an ageing society. Secondly a more relevant definition of flexibility could be offered, building on the EOC's third generation of flexibility that provides more autonomy and control for employees, underpinned by employers focused on output and performance (rather than working time), with the potential of enhanced technology and communication methods to facilitate and support the relationship between employers and employees (EOC, 2007a).

This shift could allow a more relevant definition of work-life balance to emerge for men and women.

7.3.3 *'Choice' for women and men to work and care?*

As defined in Chapter 1, in order to achieve gender equality, men and women need to be able to exercise genuine choice in decisions about work and care. A variety of factors – such as welfare state policies and interpretations of gender – are significant in the way that these choices are constructed. For example the assumption of an adult worker model, where all adults are actively engaged in the labour market, is problematic as gender disparities in the labour market (and home) are overlooked. Choices are not constructed in a vacuum and wider gender disparities are also important to consider. Recognising and addressing the wider context of gender pay inequalities and occupational segregation could enable individuals to make choices that are less constrained. Acknowledging the potential scope offered by diversity – and in particular how inequalities are perpetuated and experienced differently – would also contribute to enhancing gender equality, in that it could allow for men and women to be able to make choices about work and care.

Enabling choice for individuals to work and care is a government priority (DfEE, Scotland Office et al., 2000; DTI, 2000a; 2005d; Home Office, 1998). At times this has been based on a 'gender neutral approach', such as through the work-life balance campaign in 2000 (Chapter 4). A lack of awareness about the intersections between gender, work and families has been evident within this part of the Government's thinking. At other times, policies have been gendered, and the Government has relied on traditional gendered stereotypes of work and care, particularly in policies to support parents after the birth or adoption of children (especially once a time period protecting the health for mothers and babies has passed).

In many instances, current government policies imply that mothers are the primary carers, who may bring in an additional and supplementary income, with fathers the main breadwinner, who may support or help to care (Chapter 4). However in doing so, it constrains choices for many families. While there may be some families satisfied with this division of labour and responsibilities, for many these 'choices' are making the best decisions based on other constraints such as the lack of affordable childcare (Perrons, 2006). At the time around the birth (or adoption) of a child, government priorities have chosen to extend maternity leave albeit with some proposed transferability, rather than improving paternity leave (or parental leave). The preference is seemingly on prioritising the mother as the primary carer. Choices for fathers to care are therefore marginalised. And proposals to introduce a period of transferable maternity leave – allowing the mother to transfer leave to the father if she so wishes – rather than an independent right to leave for fathers is further evidence that gender stereotypes of care and work are reinforced.

The level of wage replacement for policies restricts or enables choice further for parents. The gender pay gap means that for many two-parent families, it may be a rational financial decision for the higher earner (i.e. usually the father) to remain in full-time employment, and the lower-paid (i.e. usually the mother) to either be employed part-time, or not to be in paid employment.⁶³ Comparatively low rates of statutory maternity pay (currently 90 per cent of average earnings for first six weeks and then £112.85 per week for 33 weeks) impact on people's decisions further. It is no surprise that when organisations supplement the amount of statutory pay, utilisation rates increase (Smeaton and Marsh, 2006). Although take-up rates were not discussed in great detail in previous chapters, it was implied that high rates of pay (and the guarantees of a job at the same level as enshrined in the legislation) were important factors that secured many women's return to work after maternity leave. Where there was not full pay for paternity

⁶³ With childcare costs high in the UK, parents – particularly in low-paid work – weigh up the costs and benefits of part-time employment. Working tax and child tax credits (which are not discussed in this research) are also important considerations in decisions to work and care. Many women return to work for the social interaction, status, self-esteem reasons that are also associated with employment.

leave, fathers tended to take annual leave (see Carvel, 2006), or return to work early. The current levels of statutory pay are not high enough to provide all parents with genuine choices.

The case study organisations all supplemented statutory provision – most notably in the public sector. Again, it was maternity provision that was the focus, where at the CGD and ALMO high wage replacement rates were available to employees for the duration of their leave. Even though in all organisations at least one week (out of two) of paternity leave was offered at full wage, the CGD had renamed paternity leave ‘maternity support leave’, and some ALMO participants commented that fathers were advised to take annual leave (for the second week), because it meant that they would be paid their regular wage and could take the leave more flexibly (rather than in a weekly block). The fact that there is no requirement to offer pay for parental leave through the legislation means that it remains out of reach for most people and is not a viable option, virtually eliminating choice in this area. Low take-up of parental leave and the fact that many fathers fail to use all their paternity leave should signal to government that leave extensions need to be accompanied by a decent wage replacement rate to genuinely ‘support choices’ for parents.

In addition, men and women are not always able to exercise the same degree of choices, suggesting that the ability to achieve work-life balance is limited. Opportunities to ‘balance’ work with other responsibilities are distributed disproportionately through the job hierarchy (Lambert and Waxman, 2005). Again this creates different choices for men and women depending not only on their home circumstances, but also their status in an organisation. Low-income employees, often women with caring responsibilities, may not have the option to reduce their working hours due to the potential loss of income. These employees may also be perceived to be the most expendable from an organisational perspective with the fewest skills and qualifications (Dean, 2007). For senior members of

staff, formal flexibility may be limited, but a sense of informal flexibility can be perceived as legitimate. This was certainly evident in the case study organisations where senior managers, often men, outlined a lack of access to formal flexibility but autonomy over time. This is in stark contrast to junior members of staff, who perhaps had to ask permission from their line managers for any changes in time, irrespective of the modification – which may include coming in a few minutes late, or going to an appointment over lunch and for in most cases, employees were willing to make up the time.

Duncan (2006, p128) suggests that ‘with its emphasis upon liberalism, individualization and preferences it is apparent that “work-life balance” will be seen as a matter of individual choice as constrained by the practical constraints of cost, time and accessibility’. By locating work-life balance policies in the context of diversity, individual choices are often constrained by dimensions such as position in the labour market, access to childcare and pay. A ‘managing diversity’ approach should be able to facilitate more flexibility for more employees, because it should recognise that different people may have different requirements. Autonomy over time has been identified as a benefit that would significantly help people in their quest to balance their multiple responsibilities (Jones, 2003). The lack of autonomy, particularly for junior members of staff, was a reported problem identified through the case study organisations and reflects the broader literature (e.g. Fletcher and Bailyn, 2005). The case studies, alongside the analysis of government policy, demonstrated that choices are constrained for many people in this and in other ways, limiting the ability that they may have to exercise choice in decisions to work and care.

7.4 Policy implications and future policy directions

This research focused on a particular set of questions related to the gender dimensions of work-life balance policies. The findings draw specifically on the literature, analysis of government documents and organisational case studies undertaken for this research.

However, it is possible to draw wider inference from this study, and outline important and relevant policy issues.

The following briefly considers aspects of this wider policy arena. The section isolates the components of developing an ethic of care alongside an ethic of work, and widening inequalities as connected areas to work-life balance policies. These policy areas highlight some of the wider implications of this research, in exploring how the equalities framework relates to work-life balance policies and the gender dimensions that emerge.

7.4.1 An '*ethic of care*' alongside an '*ethic of work*'

The relationship and boundaries between care and work has been a theme throughout this research. The relationship and how it is considered is significant in defining future policy directions for work-life balance policies. Women still undertake the majority of care work. And the reasons that women tend to care vary, from economic reasons (attributed to men often earning more), to providing a sense of self, purpose and place, and / or to perceptions about 'the right thing to do'. Described as a 'labour of love' (Graham, 1983), the concept of care is often associated with understandings and interpretations of motherhood and femininity (Williams, 2004). These interpretations and understandings therefore also contribute to men's decisions about caring. On the one hand, gendered assumptions in the labour market, and stereotypes of women's and men's work, combine to create *push* and *pull* factors for women and men in caring roles. On the other hand, gendered assumptions of care create *push* and *pull* factors for men and women in decisions about paid work. And with many women actively engaged in the labour market, and society's care needs growing given an ageing population, the prominence of the

adult worker model has resulted in a 'care deficit', where time and willingness for unpaid care is potentially under threat (Ehrenreich and Hochschild, 2003; Williams, 2004).

The 'care deficit' has global gender implications, in that women entering the workforce who are no longer 'willing' or 'able' to undertake care (and domestic responsibilities) are *pulling* migrant workers from poorer nations, where poverty is *pushing* women from these poorer nations to move so that they can gain employment and support their families financially (Ehrenreich and Hochschild, 2003). The result of these increasingly complicated 'care chains' raises questions about widening global inequalities, and the movement of labour and migration. This adds a global dimension to an already complex problem. Alongside domestic predictions that work-life balance will become more critical as female labour market participation rates are expected to rise further and parents are increasingly expecting more quality family time (PMSU, 2008), global dimensions and the movement of 'care' is likely to gain further prominence as a policy concern.

As has already been discussed, the narrative of fatherhood has changed, with fathers wanting to be more actively involved in their children's lives in a variety of ways (Burgess and Russell, 2004). But gender pay gaps and fiscal and leave policies combine to limit choices for fathers, many of whom work long hours. The Fatherhood Institute⁶⁴ – a think tank that works towards enhancing fathers' relationships with their children, and supporting fathers (and mothers) as carers and earners – aims to raise recognition of fathers' essential caring role (Fatherhood Institute, 2008). Within these aims, some men are challenging the traditional boundaries of care. The Institute promotes gender awareness that recognises men's marginalised role in care alongside women's marginalisation at work (Orr, 2008). Many men are involved in unpaid care, but women still undertake most of the caring work in the UK (Lader, Short et al., 2006), and it should not always be assumed that this is what people would 'choose' to do.

⁶⁴ Formerly Fathers Direct, the Fatherhood Institute was launched in January 2008.

In Fraser's (1997) universal caregiver model, the assumption that care is 'women's work' is challenged, with the aim of dismantling the 'gendered opposition between breadwinning and caregiving'. Although utopian in aspiration, the universal caregiver model highlights the extent to which change needs to occur. Fraser bases her ideals on recasting the tensions highlighted through the 'same-difference' dichotomy. She argues that if her model were adopted, care work would be upheld as a value in society, and jobs would be designed based on the premise that the employee may also have care responsibilities. Offering perhaps a more applicable framework, Pascall and Lewis (2004) outline a range of policies at the levels of the individual, household, civil society and the collective that relate to the dimensions of time, voice, paid work, income and care work to pursue gender equality outcomes. In doing so, they also challenge policy makers to look beyond paid work.

Challenging the normative discourse leads to the development of an 'ethic of care' alongside an 'ethic of work'. Williams (2001; 2004) argues that 'an ethic of care' is missing from the policy debate, that should be seen as underpinning citizenship, cohesion and equality. Valuing an 'ethic of care' – alongside an 'ethic of work' – would begin to fundamentally shift conceptualisations of work and care in the short term, this would provide opportunities to listen to the requirements of parents, children and other carers, whereas the long-term goal would be to highlight care as part of a more inclusive society (Williams, 2004)

A model such as the universal caregiver together with understandings of an ethic of care and work, although aspirational poses essential questions for the current work-life balance narrative and its relationship to diversity. A universal caregiver model could begin to address wider societal divides. As Jane Lewis argues (2001; 2002) there is a mismatch between society's care needs and the reality in that women absorb many costs

associated with care. In the promotion of an adult worker model, arguably the relationship between care and work is not adequately analysed, as unpaid and paid work remain discrete categories. This is despite women being encouraged to shift into employment and maintain many of their household and caring responsibilities. This inequality could be addressed partly through policies that consider the allocation of money, services and time and could promote a more cohesive and inclusive understanding of equality.

7.4.2 Growing inequalities?

The gender composition of the workforce as well as how we value care, are two examples of areas that need to be considered to address growing inequalities, both amongst different groups of women, and within society more generally. This research has shown how work-life balance policies can create or constrain choices for individuals in the amount of time and money they offer, as well as the messages that they send regarding caring responsibilities. The research has also shown that the current conceptualisation of work-life balance policies contributes to growing inequalities, as choices are disproportionately distributed throughout the job hierarchy – which in turn has an effect on how choices are negotiated in the home.

Particular inequalities emerge between women with different characteristics. In terms of educational attainment, which is linked to earning potential, significant differences are apparent. For example, after childbirth women with few or no educational qualifications will experience higher rates of downward occupational trajectory and take longer to return to work compared to women with high levels of educational qualifications (Dex, Ward et al., 2008). Often higher-paid professional women will exhibit similar characteristics (in working patterns) to men. As some women are breaking through the 'glass ceiling' – that has obstructed women from gaining access to high status, high earning jobs for decades – they are often displaying characteristics normally associated

with the 'ideal worker', of long working hours and continuous employment patterns. As touched on above, high-paid women often achieve higher levels of work-life balance satisfaction by employing low-paid women to do what is commonly referred to as 'women's work', as well as having more autonomy over their working time. It also highlights the inequalities between different groups of women which also have ethnic, age and disability dimensions. These patterns are generating divisions between women (Crompton and Brockmann, 2006).

An interpretation of diversity drawn from the feminist literature that addresses intersections of inequality would be beneficial in understanding inequalities and begin to help devise policy directions. For example this type of understanding could increase awareness that different black and minority ethnic women experience greater pay penalties compared to 'white' women as well as men (EOC, 2007b), leading to potential strategies that address local community employment initiatives. Unlocking people's potential by providing options for career progression has been highlighted as an issue particularly for low-paid workers (many of whom are women) and women (more broadly) that will reduce inequality (PMSU, 2008). Whilst this is a complex issue that extends beyond work-life balance policies as it requires consideration of educational outcomes and the tax and benefits system, a more considered approach towards work-life balance policies has a role to play in potentially mitigating inequalities.

7.5 Potential for future research

There are a range of questions that arise from this research that could be pursued in further research. Some suggestions include:

- Expanding this research through conducting additional organisational case studies with different characteristics to explore how different factors may affect the scope of work-life balance policies, for example SMEs or organisations in different industrial sectors.

- Exploring individuals' experiences of work-life balance policies. This research was concerned with the conceptualisation and implementation of work-life balance policies, but did not address how these policies have actually enabled and constrained individual choices. It could be assumed that issues such as preferences, the local labour market, and staff demands would be important factors here.
- Drawing on the theoretical literature, this research could firstly be extended to address complex intersections of inequality that look beyond gender alone. This study has been about gender, but gender is not necessarily a proxy for how other inequalities are perpetuated and experienced (and vice-versa) in the workplace. The second major way to expand this research, drawing on the theoretical framework, is to begin to operationalise the potential of a capabilities approach into practice. As the EHRC become more established, this may become a more genuine prospect, with relevant policy examples.

7.6 Conclusion

Work-life balance policies are welcomed by employers and employees (e.g. Hogarth, Hasluck et al., 2001; Hooker, Neathey et al., 2007; Woodland, Simmonds et al., 2003). There is a need to help people 'balance' work with other parts of life. This research has illustrated that the current work-life balance agenda makes some progress in providing people with these opportunities. The research also suggests that there is scope – and indeed an imperative – for the Government and organisations to promote gender equality aims more vigorously. The Government as well as organisations need to address how they conceptualise and implement work-life balance policies to genuinely progress sustainable outcomes for gender equality in society. Consideration of care, work, time and money as resources over the life cycle is critical to the advancement of a more inclusive and equal society.

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APPENDIX A: CASE STUDY LOG

Throughout the process of negotiating access to case study organisations, I kept a log documenting the contacts, emails, phone calls and letters that I sent and received. Below is a summary of this log.

January 2006	- Advised by a university colleague to email a professor from City University who undertakes research on work-life balance for any suggestions of companies that may be willing to participate in my research. Response was encouraging but not able to assist directly. - Advised by university colleague to email chief executive of Working Families charity for suggestions of companies that may be willing to participate in my research. Response was encouraging but not able to assist directly. - A friend who is an 'equality and diversity consultant' offered to circulate my research request to her contact network. I wrote a blurb outlining my research. Several potential contacts were generated that I followed up. - Attended a CIPD Diversity and Equality evening for Women in Engineering. Several attendees offered to circulate my research request. - Advised by university colleague to email a professor from Manchester Metropolitan University who undertakes research on work-life balance. University colleague from Manchester Metropolitan University suggested contacting a county council where she had undertaken research some years ago. - Advised by university colleague to contact trade unions. Contacted a colleague at the TUC.
February 2006	- Contacted Business in the Community (previously 'Opportunity Now') to ask whether they would be able to assist. They passed my request on to several potential contacts of member organisations. A couple of potential leads were generated that I followed up. - Contacted www.womenwanttowork.com about posting my request on their web-site or to members – but they were not willing to. - Contacted the EOC's equality exchange for advice but they were not able to help. - Contacted the Work Foundation who facilitates 'Employers for Work-Life Balance' group, but they were also struggling to negotiate access and so were not in a position to pass on any details.
March 2006	- After correspondence with a city council, my research request was rejected. - After correspondence with an investment bank my request was rejected. - A colleague approached a publishing house on my behalf but my request was rejected. - Contacted a training organisation specifically for women for suggestions of organisations who may be willing to participate, but no response was received. - Contacted regional employers' organisation on recommendation of county council - County Council were not able to accommodate my request nor able to suggest any alternative organisations. - Working Families passed on some names of equality and diversity specialists within the private sector. I contacted all of them and they all rejected my request. - A friend of a friend contacted a retailer on my behalf, but was rejected. - A friend contacted their contact at a national bank where my request

	was accommodated by the CSR team and then rejected by the HR director.
April 2006	- A central government department contacted me in response to the blurb sent out by my friend the 'equality and diversity consultant'. I arranged an initial meeting and they agreed to participate in my research. - An arm's-length management organisation (ALMO) contacted me in response to the blurb sent out by my friend the 'equality and diversity consultant'. I arranged an initial meeting and they agreed to participate in my research. - Through a colleague I contacted another trade union. My request was circulated to union representatives in finance organisations, but no responses were received. - Through a colleague, I contacted a research organisation which had previously conducted research in organisations on work-life balance, but they were not able to assist. - Contacted the London and Oxford branches of the CIPD to ask if they knew any organisations that may be willing to participate. Neither was able to assist.
May 2006	- Contacted another financial services company through a contact – but request was rejected. - Emailed someone who I met last year at a seminar to ask if they had any potential contacts. Responded with a contact in a financial services organisation that was willing to consider my request. I arranged a meeting and they agreed to participate.

APPENDIX B: EMPLOYER PROFILE

1. What is the main business of the organisation? _____
2. For how many years has the organisation existed? _____
3. Currently how many employees are there on the organisation's payroll?

Total

3a. How many of these employees work 30 hours or more per week? <i>(male and female separately)</i>		3b. How many of these employees work between 15-29 hours per week? <i>(male and female separately)</i>		3c. How many of these employees work less than 15 hours per week? <i>(male and female separately)</i>	
male	female	male	female	male	female

4. How many employees are in each occupational grade?

Grade	Full time		Part time		Total
	male	female	male	female	

- In total, how many employees (full and part time) were on the payroll at 'the organisation' 12 months ago (in 2005).

Total
- If male and female rates of part time and full time work are known, please add in.

male

female

- How many of 'the organisations' employees are members of a trade union or independent staff association (whether recognised by management or not)?

Total

- Of those currently employed here, how many

are aged 16 or 17

are aged 18-21

are 50 or above

are from a non-white ethnic group

have a long term disability

Male

Female

Total

- How many employees at the organisation are working on temporary or fixed-term contracts?

Total
- (Do not include employees who are working through a probationary period that might lead to a permanent contract of employment)

◊ if this is unknown, may need to be full-time – part-time figures

9.

How many temporary agency staff are currently employed?

(Temporary staff hired from an agency – these members of staff should *not* be included in totals given elsewhere)

Total
10.

Does the organisation have formal equal opportunities, work-life balance policies, equality and diversity policies etc?

(please attach)
11.

Which of the following policies are available to employees?

Are all employees eligible?

(attach copy of policy where possible, or provide details for example whether beyond statutory provision, payment)

Policy	Organisational provision	Organisational eligibility
Maternity leave	(eg. length of leave, level of payment, preservation of employment rights, annual leave, promotion during leave)	(eg. length of service, temporary employees)
Paternity leave	(eg. length of leave, level of payment, preservation of employment rights, annual leave, promotion during leave)	(eg. length of service, temporary employees)
Parental leave	(eg. length of leave, level of payment, preservation of employment rights, annual leave, promotion during leave)	(eg. length of service, temporary employees)
Adoption leave and pay	(eg. length of leave, level of payment, preservation of employment rights, annual leave, promotion during leave)	(eg. length of service, temporary employees)
Right to request flexible working	(eg. types of requests considered, job sharing, part-time working, flexi-time, term-time working, school-hours working, compressed hours, annualised hours and working from home)	(eg. parents with children under certain age, carers, length of service)
Short term / emergency leave	(eg. types of requests considered, length of leave, level of payment)	(eg. parents with children under certain age, carers, length of service)
Childcare	(eg childcare vouchers, childcare benefits / subsidy, workplace nursery, after-school activities)	(eg. parents with children under certain age, length of service)
Other	(eg. career breaks)	

2.

Are utilisation rates of these policies monitored?

yes / no
- 2a.

If so, could you please outline the process and attach previous reports / data that you have collected?

APPENDIX C: INTERVIEW SCHEDULE

Introduction

- Thank you for time
- Briefly explain how this interview fits into overall PhD
- Interviews will be recorded
- Confidentiality (names will remain anonymous).
- That it is your opinion about these issues that I am interested in particular
- Consent form and ask them to sign it

About the interviewee

1. Is the respondent male / female
2. What is your current job title?
3. Which of the following best describes your role:
 - Manager
 - Administrator
 - Staff / union representative
4. How long have you been employed at the organisation?

Questions 5 – 10 for staff / union representatives

5. What is the name of the employee committee?

6.

a. How many employees do you represent? All (100%) Almost all (80-99%) Most (60-79%) About half (40-59%) Some (20-39%) Just a few (1-19%) None (0%)	b. What proportion of your members are women? All (100%) Almost all (80-99%) Most (60-79%) About half (40-59%) Some (20-39%) Just a few (1-19%) None (0%)	c. What proportion of your members are employed part time? All (100%) Almost all (80-99%) Most (60-79%) About half (40-59%) Some (20-39%) Just a few (1-19%) None (0%)
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7. Do you represent all occupational groups?
8. In the last 12 months, have you spent time in your job as a staff rep on issues related to equality? Can you give an example(s)?
 - negotiating policies
 - taking individual cases
9. What is the consultation and negotiation process with management on issues that relate to equality and ‘work-life balance’ policies?
 - Is this effective?
10. How do you communicate with the employees you represent?
 - Is this effective?

'Equal opportunities' to 'work-life balance' – the process?

11. What policies does the organisation have that relate to 'equality'?
12. What policies does the organisation have that relate to 'work-life balance'?
13. Why do you think that the organisations' work-life balance policies are under the banner / heading / framework?
14. What do you see as the relationship between equality and work-life balance?
15. What do you think the aims of these policies are for the organisation? What is the organisation trying to achieve?
16. Have the aims developed and / or changed over time?
How and why?
 - Are there different aims for staff of different grades, for part-time / full-time employees, for managers / non-managers, for senior staff?
17. What do you think the main drivers are for the organisation having introduced / extended provision in the area of work-life balance (beyond statutory)?
 - Legislation, government
 - Evolution from previous policies – eg. equal opportunities
 - Formal / informal
 - Key people in the organisation
 - 'Business case' needs of retention, recruitment, 'business case'
18. How are policies related to work-life balance formulated?
 - What is your role?
 - Are they reactive / proactive to employee requirements?
 - Are employees consulted?
 - Do they include the voice of staff?
 - Commitment of senior management?
19. How are work-life balance policies implemented?
 - For example, how does an employee request the right to work flexibly, who decides, what is the process, is there an appeals procedure?
 - What about other policies – eg. career break?
 - How many applications are received every year (stat and beyond)
 - How many were approved?
20. **(for managers only)** What is your role as a manager in managing these requests and decisions for implementation?
21. How are employees made aware of what is available to them?
 - Part of induction
 - In staff handbook
 - Informed by supervisor/manager
 - Staff meetings
 - Upon asking manager
 - Some other way – please specify

22. Do all employees have access to all of these policies?

- Is it restricted to some employees? (eg. stat provision for flexible working is for parents)
- If there are restrictions, who do they apply to?
- Is it based on type of job, grade, level of management?
- Whether or not they may have caring responsibilities?
- Is it based on whether employees are full time / part time?
- Type of contract (temporary, permanent)
- Length of service

23. (If there are employees not eligible for some policies) what has been their reaction to others utilising them?

- For example if flexible working is only available to parents, what has been the response of employees who are not parents?

24. Are there certain jobs / grades where work-life balance policies are more frequently utilised? What do you think the reasons for this may be?

25. What do you think are the main reasons that employees may not take up 'work-life balance' policies offered to them?

- Professional / career development
- Management attitudes
- Service / business needs
- Colleagues' attitude
- Financial implications eg salary reduction
- Gender stereotypes
- Organisational culture
- Other

26. Do you think that current provision matches demand for work-life balance policies at the organisation?

Conclusion

27. How would you evaluate the organisation's approach to work-life balance?

28. How would you evaluate the organisation's approach to gender equality?

29. How do you think policies will develop in the future?

- Do you think that your organisation will extend / decrease 'work-life balance' policies?
- Do you think that the process of implementation will change?
- Do you think that the people who utilise policies will change in terms of grade, job, sex, age, caring responsibilities?

Comments / questions

APPENDIX D: SUMMARY OF INTERVIEWS CONDUCTED

Date of interview	Organisation	Job Title	Length of Service	M/F
26/05/06	CGD	Staff representative	16 years	M
12/06/06	CGD	Senior manager, HR	3 months	F
20/06/06	CGD	HR^	4 years	M
20/06/06	CGD	HR^	20 years	F
21/06/06	CGD	Senior manager *	6 years	F
28/06/06	CGD	Senior manager, equality and diversity	2 years, 4 months	M
30/06/06	CGD	Staff representative	5 and a half years	F
13/07/06	ALMO	Senior manager, HR	3 years	F
13/07/06	ALMO	Senior manager	20 years (local authority and ALMO)	F
18/07/06	ALMO	Staff representative	2 years	F
18/07/06	ALMO	Senior manager	21 years (local authority and ALMO)	F
19/07/06	ALMO	HR	5 years (local authority and ALMO)	F
20/07/06	CGD	Senior manager, HR	4 and a half years	F
25/07/06	CGD	Equality and diversity	5 and a half years	F
28/07/06	ALMO	Staff representative and manager	5 years (local authority and ALMO)	M
1/08/06	ALMO	Staff representative	15 years (local authority and ALMO)	F
2/08/06	ALMO	Union representative	14 years Branch Secretary; 31 (local authority and ALMO)	M
3/08/06	CGD	Senior manager, HR	Just over a year	F
8/08/06	ALMO	Senior Manager*	1 and a half years	M
9/08/06	ALMO	Equality and diversity	1 and a half years	F
24/08/06	ALMO	Union representative	6 months at ALMO. Has been Union rep for decades	M
7/09/06	FSC	HR	3 months	F
7/09/06	FSC	Staff representative	2 and a half years	M
7/09/06	FSC	Senior manager, HR	6 and a half years	M
7/09/06	FSC	Senior manager.	6 and a half years	M
12/09/06	FSC	Staff representative and manager	15 years	F

^ interview was conducted together
*Asked that interview would not be recorded

APPENDIX E: INFORMATION AND CONSENT FORM

University of Oxford
Department of Social Policy and Social Work



BARNETT HOUSE
32 WELLINGTON SQUARE
OXFORD OX1 2ER
ENGLAND
TEL 01865 270325
FAX 01865 270324
<http://www.apsoc.ox.ac.uk>

Information and consent form

PhD research: Gender dimensions of work-life balance

Thank you for agreeing to be interviewed for my PhD research.

Please find a description of my research as well as a consent form to be filled in and signed.

If you have any questions (before or after the interview), my contact details are:
dalia.ben-galim@socres.ox.ac.uk / 07813851820

My research explores the gender dimensions of work-life balance policies in the UK. The key question I consider is: as there has been a shift in emphasis from equal opportunities policies towards work-life balance policies, what are the implications for how gender is considered in work-life balance policies by the UK government; and how have these policies been implemented by organisations?

The research core of my thesis is a two-stage process. The first stage involves an assessment of government policy primarily through the analysis of policy documents. The second stage introduces a number of case studies to illustrate implementation in both the public and private sectors. Throughout, the analysis is supported by a literature review.

Interviewee:

Organisation:

Job title:

I confirm that I have received information about the research.

I understand that I may stop the interview at any time and that I am also free to choose not to answer particular questions.

I understand that this interview will be taped and that I may ask for the tape-recorder to be turned off at any point.

I understand that the findings of this research will be published and that the researcher may use my exact words and some of the details that I have given. However, I will not be named and no details will be given which would enable me to be identified.

I understand that the interview is confidential and no personal details will be given to anyone else.

I agree to be interviewed in connection with this research project

Signature Date

APPENDIX F: UK CHRONOLOGY OF WORK-LIFE BALANCE POLICIES

The table below briefly outlines the chronology and current provision of work-life balance policies. The focus is on leave policies, working hours and protection for part-time workers. The minimum statutory provision is outlined.

Some employers extend this statutory framework for their employees.

Other policies, such as the national minimum wage, working tax credit and child tax credit could be included in a broader work-life balance context, but are not discussed in this context.

The information is reflective of statutory provisions available in December 2007.

	Provision
Maternity leave	- EU Council Directive 92/85/EEC of 19 October 1992 ‘on the introduction of measures to encourage improvements in the safety and health at work of pregnant workers and workers who have recently given birth or are breastfeeding’ provided women with 14 weeks’ maternity leave without loss of employment rights (EU, 1992). - As a result of this Directive, maternity leave was introduced in the UK in October 1994. - Significant reforms to provision occurred in 1999, 2003 and 2006. - In 1997, maternity leave was for 18 weeks’ paid at £55 a week (DTI, 2005d) <i>Current provision (BERR, 2007b)</i> - Entitlement to 52 weeks’ maternity leave. 26 weeks’ ordinary maternity leave (OML). 26 weeks’ additional maternity leave (AML). - Statutory maternity pay (SMP) (39 weeks’) 6 weeks’ paid at 90% average salary. Remaining 33 weeks’ either flat rate of £112.75 per week or 90% of weekly wages – whichever is less. - Increased emphasis on keeping in touch schemes. - Entitled to return to a similar job with the same terms and conditions. - Maternity allowance is maternity pay for those not eligible for SMP (e.g. self-employed, changed jobs during pregnancy, low income or periods of unemployment).
Paternity leave	- Paid paternity leave was introduced in the UK in April 2003 as part of the Employment Act 2002. The rate of pay has increased since its introduction consistent with increases in statutory maternity and adoption pay. <i>Current provision (BERR, 2007d)</i> - Up to 2 weeks’ leave. Employee must have 26 weeks’ continuous service and have responsibility for the child. - Statutory Paternity Pay (SPP) of £112.75 a week or 90% of average weekly earnings if less than this.

Parental leave	- EU Council Directive 96/34/EC of 3 June 1996 on the framework agreement on parental leave concluded by UNICE, CEEP and the ETUC (EU, 1996) created the basis for parental leave in the UK. Male and female workers granted the right to unpaid leave of at least three months. - The UK Government vetoed the implementation of parental leave at first. It was introduced on 15 December 1999 (HM Treasury and DTI, 2003). <i>Current provision</i> (BERR, 2006b) - Up to a maximum of 13 weeks' unpaid time off for parents to care for a child (aged under 5 or the fifth anniversary of adoption). Parents of children who receive the disability living allowance (DLA) are entitled to 13-18 weeks' leave up until the child is 18. - Each parent is eligible to take parental leave – conditional on 52 weeks' service.
Adoption leave and pay	- Adoption leave and pay was strengthened in the Employment Act (2002) to be consistent with statutory maternity and paternity provision. - Eligible couples that adopt can decide on which one of them will take Statutory Adoption Pay (SAP) and the other parent will be eligible for two weeks' paid paternity leave (HM Treasury and DTI, 2003, p26). - In 2003, it was expected that close to 4,000 parents and their families will receive up to £2,600 as a result of the new right. <i>Current provision</i> (BERR, 2007c) - Similar to maternity and paternity leave (as above). Ordinary Adoption Leave (OAL) is for 26 weeks. Additional adoption leave (AAL) is for a further 26 weeks. Paternity leave is available for 2 weeks. - Statutory Adoption Pay (SAP) is paid for 39 weeks.
Short-term/emergency leave	- Rights to time off for dependents were introduced in December 1999. <i>Current provision</i> (BERR, 2006a) - Provides protection for employees to take leave for dealing with specific circumstances. - Dependents are considered to be partner, child, parent or someone living with you. - Employees are entitled to time off to deal with an illness of a dependent, unexpected changes to childcare arrangements, or to deal with matters arising from the death of a dependent. - There is no obligation for your employer to pay you, although some do. - The length of time off is described 'as long as it takes to deal with the immediate emergency'.
Right to request flexible working	- The right to request flexible working was introduced in April 2003 for parents with a child aged under six or 18 if they are in receipt of DLA. - The right to request flexible working was extended in April 2007 to carers. <i>Current provision</i> (BERR, 2007a) - Obliges an employer to consider an employee's request for flexible working. It covers the number of hours an employee works and the time and place of work. - An employee must be a parent with a child under six years of age; or under 18 if they are in receipt of the DLA; or caring for an adult (who is a spouse, partner, civil partner or relative; or lives at the same address). - An employee must have 26 weeks; of continuous service. - An employer has a 'duty to consider' an employees' request. An employer can refuse / accept the request, but in doing so needs to prove business reasons. - An employer can use business reasons for granting the request.

Childcare	- Public childcare is limited. The National Childcare Strategy has been important in creating childcare places and Sure Start Programmes have established childcare for families in disadvantaged areas.
Part-time workers regulations	- The Part-time Workers Regulations (EU Directive 97/81/EC) are part of the Employment Relations Act (1999). These regulations implement the European Directive for part-time workers. It was introduced on July 1, 2000 - 'The regulations ensure that part-timers are not treated less favourably in their contractual terms and conditions than comparable full-timers' (DTI, 2002). - This includes that part-timers are in principle entitled (pro-rata) to the same rate of pay, access to company pensions, annual leave, maternity, paternity, adoption and parental pay and leave, sick pay and access to training.
Working time Regulations	- The Working Time Regulations are based on EC Directive 93/104/EC. - It establishes limits to weekly hours, night work and provides basic entitlements to rest periods and annual leave. It is driven by a commitment to health and safety. - The regulations outline: ▪ 'A limit of an average of 48 hours a week which a worker can be required to work (though workers can choose to work more if they want to). ▪ A limit of an average of 8 hours work in 24 which nightworkers can be required to work ▪ A right for night workers to receive free health assessments ▪ A right to 11 hours rest a day ▪ A right to a day off each week ▪ A right to an in-work rest break if the working day is longer than 6 hours. ▪ A right to 4 weeks' paid leave per year' (BERR, 2007e). - 'The Working Time Directive gave Member States the ability to allow individuals to opt out of the 48-hour working time limit. Our guidance states that even if an individual worker agrees to work more than 48 hours, their employer must not allow them to do so unless they sign an opt out and workers cannot be dismissed or suffer detriment for refusing to sign. Employers must keep a record of who has agreed to work long hours' (DTI, 2004d, p13).
* For maternity, paternity and adoption pay employers are able to recover 92% (or 104.5% if NI payments are less than £45,000) to cover costs. Funding is also available in advance.	