

Work-life balance surveys

Research shows there are significant business benefits associated with implementing work-life balance policies. In a Department of Labour scan of organisations implementing work-life balance policies, employers reported experiencing benefits such as:

- improved recruitment and retention rates, with associated cost savings
- reduced absenteeism and sick leave usage
- a reduction in employee stress and improvements in satisfaction and loyalty
- greater flexibility for business operating hours
- improved productivity
- improved corporate image, becoming an 'employer of choice'.

Employees in such organisations reported significant benefits such as:

- being able to effectively manage multiple responsibilities at home, work and in the community without guilt or regret
- being able to work in flexible ways so that earning an income and managing family/other commitments becomes easier
- being part of a supportive workplace that values and trusts staff.

This document is to help you to survey the amount of work-life balance your employees feel they have in the organisation. In addition to a model survey tool, which can be adapted to the particular needs of an organisation, there is advice about how and when to run a successful survey and how to process the data that is collected.

Conducting a work-life balance survey

Suggestions about how to run a successful survey process, including when and how a survey can be used

A 'model' work-life balance survey

Adaptable to the particular needs of your organisation

Processing and analysing the data

Suggestions for interpreting the data

Conducting a work-life balance survey

A work-life balance survey can indicate what the organisation is currently doing well, whether employees feel they have work-life balance issues, provide information about possible causes of any difficulties and suggests what could be done to address the problems.

A quantitative survey

The survey is designed to produce quantitative information. Most questions are 'close ended' – respondents have to pick one of the available answers. This makes it easier to process the information. If your organisation has sufficient in-house resources, you may want to consider including questions that give you more detailed information about employees' experiences and opinions.

Often the results of the survey can provide information that you may want to explore further through discussion with staff, interviews or focus groups.

When to consider using a survey

Surveys will not provide the full picture about the work-life balance in an organisation. They are good for raising awareness of the issue, prompting discussion and giving the organisation an overview of the issues. They can also provide a benchmark for measuring future progress. They generally do not provide you with detailed information about the issues or detailed explanations and solutions.

Surveys are generally not suitable for small organisations. You need to have sufficient respondents to make percentages meaningful. Ideally, you will need at least 100 respondents to make this survey work well.

If you have used surveys before in your organisation you will have some idea about the likely response rate. The organisations that participated in the Department of Labour's work-life balance project had response rates ranging from 20-99%. Obviously the lower the anticipated response rate the larger the organisation needs to be to achieve around 100 survey respondents.

If surveys have never been particularly successful in your organisation then it may be wise to consider other approaches to getting the information – if you have a process that works for you, use it!

Some organisations may choose to 'piggyback' some of the work-life questions onto an existing organisation survey (e.g. an annual climate survey). It is unlikely that you will be able to include all the questions in the model survey, so pick the ones that will give you sufficient information to consider any further action.

Even if a survey is not the best tool for your organisation, you may find the survey questions helpful for use in another process. Some organisations (especially small organisations) use the questions as a basis for staff discussions – perhaps in team meetings.

Communicating with staff

The success of any survey depends on good communication with staff.

If the work-life balance project is being undertaken in partnership with a union, its members can be extremely useful in helping to communicate with staff.

Communication should include:

- why the project is being undertaken
- what work-life balance means
- who is involved in running the project
- why the survey information is important
- what happens to the information
- statement about confidentiality
- a commitment from the organisation to seriously consider the results
- a commitment to inform staff of the outcome.

Team leaders, supervisors and union delegates need to be able to answer any questions staff may have about the survey.

The communication should take care not to 'over-promise' – not all suggestions or 'wish lists' will be actioned. On the other hand, staff need a sense that it is a transparent and sincere process.

Things to do before you survey

It is easy to under estimate the amount of work involved in running a survey. It is advisable to have one person responsible for running the process and making sure it happens. If no-one in your organisation has experience in running a survey, you may need to consider getting some external assistance.

You will need to plan for:

- customising the survey to your organisation (the survey contains hints on doing this)
- working out the right time to conduct the survey – consider work peaks and flows, staff leave time, any other major work processes/changes underway etc
- the timing of communication with staff
- whether you will run the survey with a sample of staff or ask everyone to complete it – a sample may be appropriate in a large organisation as long as different work areas, demographic difference etc are appropriately represented. Get advice if you need to.
- how staff will return their survey (in a box in the workplace, electronically etc)
- a person/people who can enter the survey results into a database such as Excel
- how you will 'interrogate' the information you get – for example, you will likely do a first cut by major categories such as gender, work area etc. After examining this, you may do a 'second cut' such as looking at a particular work area by shift and 9-5 staff. Running tables on everything, just because you can, means you will 'drown in data' and it will make it difficult to work out what is meaningful. Treat it like a treasure hunt!
- a person/people who can manipulate the data and produce percentages and tables
- a person/people who can interpret the results and consider what further 'digging' needs to be done with the data
- how the results can be best presented
- a way of providing the results to the project team, working group etc

A model work-life balance survey

Introduction

Practice note: Below are some suggestions for an introduction to the survey. The aim is to give staff a good picture of what it is all about and what is expected of them. You may need to adapt the language.

(Name of company or organisation and union if appropriate) is asking you to complete this survey to help us understand any work-life balance issues experienced by our staff. Work and life balance is about the ways you divide your time and energy between paid work and all the other things you need and want to do.

The survey is part of a project being run by a working group of staff, union and management representatives.

We are keen to know what issues you face and what makes balancing your work and life commitments easier and harder. It should take you about 15 minutes to complete the survey.

The information you give us is confidential and no individual information will be included in the report.

When you have completed the survey you can place it in the marked box in the staff room.

Questions

About your work life-balance

1. How would you rate your own work-life balance?
 - a. Very good
 - b. Good
 - c. Poor

2. How much difficulty do you have in getting the balance that is right for you?
 - a. A lot
 - b. Some
 - c. None at all

3. How important is it to you to balance you work and the rest of your life?
 - a. Very important
 - b. Important
 - c. Not important

4. Thinking about your paid work at (name of company or organisation), how often does work make it difficult for you to:
 - spend time with family or people close to you
 - take part in community activities
 - keep fit and healthy
 - take care of personal business e.g. banking, getting your car fixed, going to the dentist
 - do any study or training you want to do
 - have enough time for leisure activities
 - meet religious commitments
 - spend time with friends
 - other (please specify)
 - a. never/seldom
 - b. sometimes
 - c. often

Making work-life balance easier

5. Do you currently use any of the following arrangements provided by (Name of company or organisation)? Please mark each one either:
- Yes
 - No
 - N/A
 - Not aware of this

Practice note: Below are examples of flexible practices that may or may not be available in your organisation. The question aims to find out both what people use and what they know/don't know is available to them. From the list select the practices that are available in your organisation (remember to include those that may only be available in some parts of the organisation)

- Flexible start and finish times
 - Choosing own lunch break
 - Choosing how many hours I work
 - Working less than full time hours
 - Forward notice about working overtime
 - Choosing my own rosters or shifts
 - Having input or being able to change my roster or shift
 - Forward notice about shifts or rosters
 - Buying or negotiating additional annual leave
 - Using annual leave in small blocks (e.g. 2 hours)
 - Flexibility in taking leave
 - Being about to take time off and make the time up later
 - Domestic leave
 - Working from home occasionally or regularly
 - Being able to take school holidays off
 - Being able to use sick/domestic leave to look after family members
 - Knowing I can leave work if there is a family emergency
 - Knowing my family are welcome to visit me at work
 - Having extra unpaid leave
 - Access to a phone or phone messages
 - Access to a shower (after exercise)
 - After school or holiday programme organised by the organisation
 - Other (please specify)
6. Of the arrangements you use, which 3 are the most helpful in helping your work-life balance?
7. Is there anything else that (name of company or organisation) does that makes work – life balance easier for you?
8. Are there other arrangements that you currently don't use or have available to you that would significantly help balance your work and life?
9. How comfortable are you in discussing work-life balance issues with your direct manager?
- comfortable
 - not comfortable
 - depends on the issue
 - N/A

What makes work life-balance harder?

10. Below are some things that can make work life balance **harder**. Please tick those that are making things harder for you at (name of company or organisation).

Practice note: Only include those that are relevant to your organisation

- Number of hours I need to work
- Starting time
- Finishing time
- Amount of notice I get of the hours I need to work
- Amount of overtime I am asked to work
- Amount of notice I get about the need to work overtime or long hours
- Timing of shifts or rosters
- Amount of notice I get about new shifts or rosters
- Having no choice about what shifts or rosters I work
- How easy it is to take the leave I need/want
- How difficult it is to take time off to attend to other things
- The times meetings are scheduled
- The times training is scheduled
- Stress associated with my job
- Amount/frequency of travel required
- Deadlines and schedules
- Having to take additional work home
- Being on call
- The expectations and attitudes of my supervisor or manager
- The expectations and attitudes of my colleagues or workmates
- Other (please specify)

Your paid work

11. How many hours would you typically work for pay at (name of company)

- a. Less than 10
- b. 10-20
- c. 21-30
- d. 31-40
- e. 41-45
- f. 46-50
- g. 51+

12. Is this your only paid job?

- a. Yes
- b. No

Note to project leader: Not all organisations are concerned to have this information. Only ask if it is important to you.

13. Do you do shift work?

- a. Yes
- b. No

Note to project leader: Include the following questions on shifts and night work only if they apply to your workplace). However, if everyone works shift, there is probably no need to ask at all

14. Does the timing of these shifts vary?

- a. Yes
- b. No

15. Are you regularly required to work nights?
a. Yes
b. No
16. Are you regularly rostered on at weekends?
a. Yes
b. No
17. Are you regularly required to work paid overtime?
a. Yes
b. No
18. How often do you need to work extra hours in your own time to get the work done?
(I.e. beyond your normal hours)
a. a few times a year
b. a few times a month
c. once or twice a week
d. most days

19. What part of the organisation do you work in?

Practice note: The distinct work units will be specific to your organisation. When selecting consider the size of the unit (one with 5 people will be too small to analyse and information could be identifiable). Combine similar units if necessary. If your organisation is not divided in this way you may want to ask for job types e.g. operations, administration, management etc. In a large organisation you may want both kinds of information to assist you analyse the information in a meaningful way.

20. How long have you worked for the company?
a. Less than one year
b. 1-<3
c. 3>5
d. 5>10
e. 10>15
f. 15->20
g. 20+

Practice note: pick times that reflect what you know about the place e.g. if the organisation has only been in existence for 10 years this will be your upper limit

About you

21. Gender
a. Male
b. Female
22. Age
23. Ethnicity
a. Pakeha/NZ European
b. NZ Maori
c. Pacific Islands
d. Asian
e. Other (please specify)

Practice Note: pick ethnic categories that are relevant to you e.g. if a majority of your staff are Pacific Island staff you may want to know more detail about specific Island groups. Don't assume you know the ethnicity of your staff – the way people look is not always how they identify.

24. Do you have caring responsibilities for: (tick)

- a. children under five
- b. children at primary school
- c. children at secondary school
- d. elderly relatives
- e. adults or children with a long term illness or disability
- f. others (please specify)

25. Do you have any other comments/suggestions about work-life balance?

Processing and analysing the data

You will need to enter the answers from the surveys into a programme such as Excel or Access. After the data has been entered in the spreadsheet or database you will generally run some initial tables. Don't be tempted to run huge numbers of tables at the start. The initial run usually features the main questions such as gender, age, workgroup etc. You may also run the questions by any other variable you suspect (from what you know of the organisation) may be important e.g. shifts or weekend work. If you find particular differences in these table (e.g. difference between men and women or shift and non-shift workers) you can then explore those difference by what they use or would like. Examine the results and see if you need to dig deeper. Remember that more detailed information may need to come from other methods such as interviews and focus groups.

Tips on what to look for

The positives as well as the less positive – it is as important that staff over 40 years of age experience positive work-life balance as it is that those aged 25-30 do. What makes the difference? Responsibility for children of different ages?

Differences between groups of staff – for example, are women reporting more difficulty balancing their work-life than men? Do shift workers report more difficulty in spending time with the family than non-shift staff? Do office based staff experience stress and deadlines more than factory based staff?

Some of the results will appear 'obvious' given what you know about your organisation. If you know that the administration area is short staffed, it is hardly surprising that they experience more stress. Bring what you know about the organisation to the examination of the results – although don't jump to conclusions and do check your perceptions with others. Working groups and project teams are very useful for this contextual knowledge.

Make sure the percentages have meaning – always think about the actual numbers. For example if there are only 20 women respondents, six of whom work part time, a result that says that 20% of female part time staff have a lot of difficulty with work-life balance needs to be treated with great caution! You may want to report that two part time female staff reported difficulty – but do not just report the large sounding 20% on its own. If your survey has been sent to a sample of the staff you will need to be careful about extrapolating from small numbers to the whole staff population.

Do not report data that could lead to the identification of the respondent(s).

The size of your sample will influence how much you can 'drill down' in the data – you need to reach a level of analysis where the percentages and cell sizes still make sense – if you need more specific information, you should consider getting it another way – such as interviews or focus groups.

Where appropriate cut the data in different ways – e.g. examine the relative percentages of men and women's use of a particular provision (say, working from home).

Be aware of the degree of the response. If 10% of people say they have a very good work life balance and 86% say 'only' good – you still have a pretty positive work life balance picture in the organisation. Check the particular characteristics and experiences of the 4% (if numbers

are sufficient) who report a poor work life balance – e.g. do they all work in one particular area or have all been with the organisation less than a year?

Be cautious with graphs and pictorial representations of data - check the scale and the numbers – dramatic looking graphical information can be misleading – even if it looks impressive and professional. The capability of the spreadsheet package should not dictate the outputs.

Avoid the use of the word 'significant' when reporting data unless you have used and understood the appropriate statistical significance test – data can be interesting and informative without being 'significant'. The word is generally used in association with a sample of staff to allow extrapolation to the whole staff of the organisation.