



CENTER FOR
EQUITY, GENDER & LEADERSHIP

SUPPORTING DUAL CAREER COUPLES

AN EQUITY FLUENT LEADERSHIP PLAYBOOK

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The **Center for Equity, Gender and Leadership** at the Haas School of Business (University of California, Berkeley) is dedicated to educating equity fluent leaders to ignite and accelerate change. Equity fluent leaders understand the value of different lived experiences and courageously use their power to address barriers, increase access, and drive change for positive impact.

Equity Fluent Leadership (EFL) Playbooks are a tool for business leaders that include plays for specific DEI-related topics and situations.

This Playbook was authored by Genevieve Smith & co-authored by Ishita Rustagi. The Handbook benefited from the contributions of many individuals. Helpful edits were provided by Jennifer Wells, Francesca LeBaron, Laura Kray, Margaret Lee and Diana-Chavez-Varela from EGAL and UC Berkeley. We are also grateful for valuable reviews and feedback provided by Anika Briner, Jeni Chih, Maria Febre, Will Riffelmacher, Abby Davisson, Megan Dalessio and Melina Wyatt at Gap Inc.; Fidelma Butler, Analisa Schelle and Evangeline Mendiola at Zendesk; as well as Jessa Deutsch and Gabriela Teran at BCG.

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SUPPORTING DUAL CAREER COUPLES

An Equity Fluent Leadership Playbook



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Center for Equity, Gender and Leadership
Berkeley Haas 2020

EXECUTIVE SUMMARY

What is this playbook?

Supporting Dual Career Couples: An Equity Fluent Leadership (EFL) Playbook is meant to provide leaders with a snapshot of key information on dual career couples and seven evidence-based plays that can be implemented to support them with positive impacts for their organization.

Who is this playbook for?

This playbook is for people working on gender equity as well as diversity, equity and inclusion more broadly at their organization. While plays will involve other players as well, think of yourself as the coach putting plays into action.

Why use this playbook?

Do you have issues retaining or hiring women in management and leadership positions in equal numbers as men? Have you noticed how Millennials and Generation X employees have values, work expectations and work-life balance goals that tend to differ from previous generations — and how these can be linked to a partner that might also have a career? Do you want to keep and attract the most talented staff no matter their gender or sexual orientation?

If you answered yes to any of these questions, this playbook is for you.

How to use this playbook?

There are two parts to this playbook:

Part A provides important information on dual career couples, an overview of the plays and some guidance to prioritize plays before taking action (think of it like training).

Part B includes each EFL Play. All seven EFL Plays have information on the play, business benefits to implementing it, indicators to track success and steps to put it into action (game time!). Plays should be selected and adjusted as needed for a customized approach that fits your organization's unique challenges and goals.





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INTRODUCTION

"On my way in, yes, I'll get to that right away." Dawn holds her 1-year old baby, Jonathan, on her hip rocking him back and forth as she finishes the conference call and bends over to slip on her heels before finishing buttoning her top. Her nanny is sick, so she had to take her first meeting from home, but luckily her mom lives nearby and is coming over to take care of Jonathan. Her partner works in finance and left earlier that morning to make sure he arrived at work before the market opened. Dawn's mom arrives in the next couple of minutes, and Dawn gushes her appreciation before grabbing her coat and rushing out the door, texting her colleague that she'll be just a couple minutes late for their upcoming meeting.

Dawn's story is both far from unique and one illustration of dual career couples. Today, white-collar employees are more likely than ever to be part of a household where both partners work full time. While partners are becoming more egalitarian, women in heterosexual dual career couples - with or without children - still do most of the household / care work and are more willing to prioritize their partners' career over their own. On top of this, workplaces have been built on a breadwinner format that makes "having it all" a myth for the vast majority of women in particular. Furthermore, all individuals in dual career couples may experience stress, conflict and time constraints resulting from managing both work and life / family responsibilities, which can be exacerbated by jobs that require travel, temporary relocation and/or permanent relocation.

If business leaders are serious about solving this and creating inclusive workforces, an essential piece of the puzzle is understanding challenges employees in dual career couples face and what to do about it. Employees in dual career couples are not a homogenous group so it is key to understand challenges faced by employees in dual career couples of different identities - including gender, sexual orientation, disability status, race, ethnicity and socio-economic status. By successfully supporting all employees in dual career couples, companies can benefit from reduced absenteeism and enhanced productivity by reducing employees work-life conflict. They are also likely to be more attractive to potential candidates, further enhancing their ability to recruit top talent.

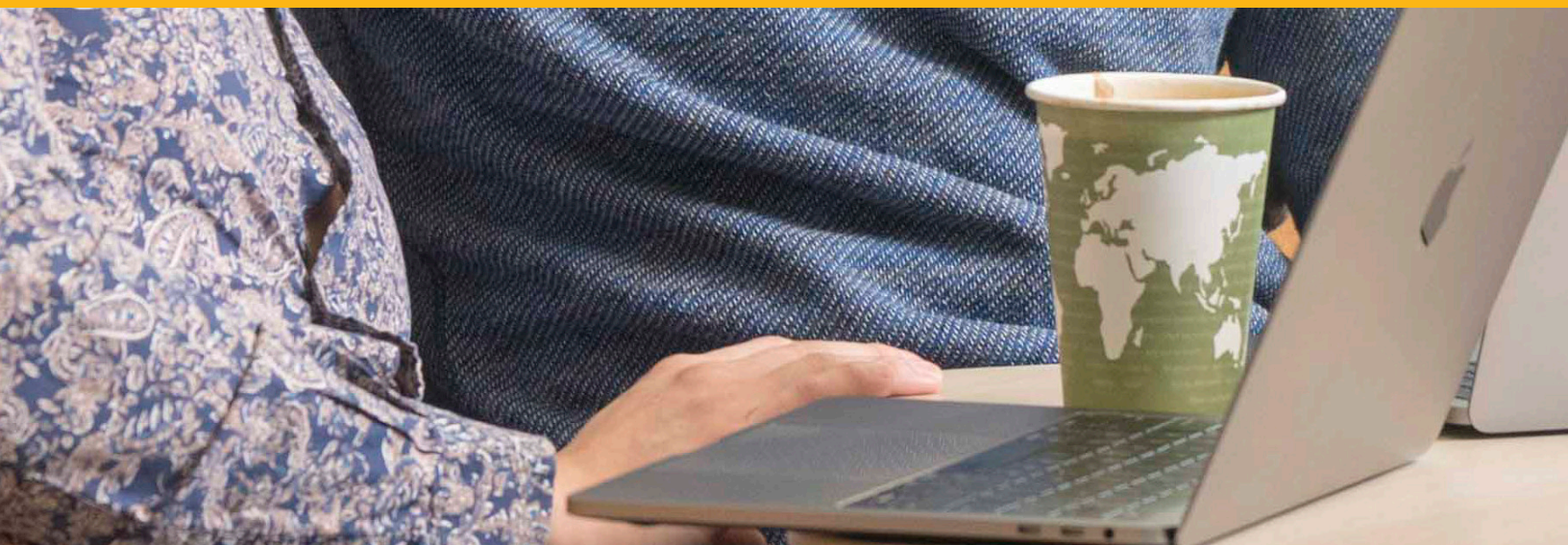
Currently most organizations don't have the frameworks in place to successfully support dual career couples. Also, by adhering to longstanding ideas around successful career paths requiring geographic mobility, these practices fall short of meeting the needs of the majority, who need to consider the impact of relocation on their partner's career. Even when the right policies, benefits and frameworks exist, internal culture may stymie progress if managers fail to normalize their use.

Much has been written about dual career couples with guidance for companies, but this doesn't always incorporate the academic literature that has been conducted in the space and may perpetuate ineffective or band-aid "solutions". We developed this Playbook to address the gap between knowledge and action. By implementing the seven evidence-based actions (or "plays"), business leaders can begin to move the needle to support dual career couples and attract, keep and grow talent.





SUPPORTING DUAL CAREER COUPLES
PART A. PREPARATION



WHAT YOU NEED TO KNOW

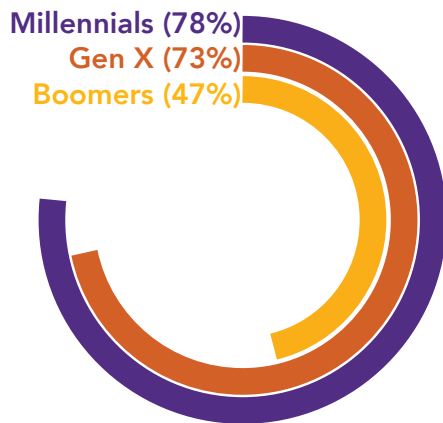
What are dual career couples?

Dual career couples (DCCs) are couples – with or without children – where both partners pursue a professional career. They are a subset of dual-earner couples and tend to be well educated couples with commitment to their jobs and respect for and interest in their partner’s career.

A majority of full-time employees (62%) in the US have a spouse/ partner who works full-time. For millennials and Gen X, the likelihood they have a partner that also works full-time is much higher than boomers (see figure 1). While the percentage of people in DCCs varies across countries, DCCs have been a growing trend globally.



Figure 1. Percentage of US employees in DCCs, by generation



Why are DCCs a growing trend?

There are more women in the workplace and the traditional male breadwinner family model is changing. In the past 40 years, there has been a steady increase of women’s participation in the paid workforce in industrialized nations. This is due to women having educational attainment equal to men’s, changing values related to women’s and men’s roles in family and society (moving towards more egalitarian partnerships), and more career options for women.

Also, the number of couples marrying with similar levels of education and ambition has risen by almost 25% in the last 30 years. Highly educated women in particular almost always live with partners who are as educated as they are and work full time. When both partners are highly educated, it makes economic sense to both be in full-time professional tracks.

Why should employers care?

In the short term, juggling work, life and family can take a toll on employees’ engagement and productivity - particularly for women. By supporting DCCs, employers can:

- **Reduce absenteeism as well as enhance productivity and retention** - with particular gains for firms employing larger percentages of women.
- **Enhance recruitment of top talent** through being more attractive to potential candidates.
- **Better capitalize on potential top talent.** This is particularly the case if firms offer flexible career development tracks as people may scale back ambitions if they don’t think a high-profile project or overseas assignment can fit with their home responsibilities.

Why are organizations struggling to support DCCs?*



Workplaces are built for a traditional breadwinner couple format – in which one partner supports the family financially and another partner remains at home – **and organizations are failing to keep up.** Organizational policies and practices are still largely predicated on outmoded assumptions that employees are predominantly male from traditional families.

Mindsets & internal culture impede progress. In some organizations, C-suite leaders may not have any direct experience with this issue, as they have a stay at home spouse and rose through the ranks in a traditional culture in which they compartmentalized work from personal life. They therefore established cultures and human resources (HR) agendas, perhaps unintentionally, in which their path is the only possible path to the top. Even if companies have policies in place that support DCCs, that isn't enough as managers often haven't adapted and are effectively implementing the policies.

A 2014 study found that men who were married to women who stayed home had less positive attitudes towards women they worked with. Indeed, many employees still believe that taking time off for a family or personal need (including childbirth) would negatively affect their career prospects.



Companies tend to have longstanding ideas around what ambition looks like – including expectations for travel and career trajectories. While variance exists between industries, bosses often want talented staff to go through a series of jobs, usually involving stints abroad. Executives in midsize and large organizations are often expected to cycle through a variety of divisions and functions (a practice that originated in the 1980s before technology opened the door to virtual, productive work). Therefore, geographic mobility tends to be an important precondition for career development, especially for high potential employees.

But today's professional employees are committed to their partner's career too and often less willing to make the tradeoff between their career and their partners. Some research shows women are less willing to accept job transfers than men, this may be due to men's career often given priority and therefore women deciding not to relocate.



*Challenges are heavily influenced by laws and social norms which vary by culture and context. For example, European countries have generous parental leave and childcare policies as opposed to the US where Americans also have lower levels of healthcare coverage and work longer than citizens of most developed countries. Companies face different constraints and challenges to support DCCs based on the industry and nature of work.

What are the challenges for partners in a DCC?

People in DCCs have demands and stressors from work and home as well as time constraints. People in DCCs are juggling spending time with their partner, family, friends, leisure, etc. – and face particular time constraints if they are parents or caretakers for elderly parents. DCCs experience more stress, work family conflict, family conflict, role ambiguity, role conflict and overload than single career couples. But more than half of employees indicate that the ability to balance work and life is very important.



Gender roles & familial culture results in more pressure placed on women. Partners are becoming more egalitarian – millennial men are more likely than men of previous generations to want to be at home and take on some domestic responsibilities so women can work. But women in heterosexual DCCs still do most of the family-related work and are more willing to prioritize their partners' career over their own (stemming from traditional gender roles and stereotypes). Women are estimated to do 1.6 times the amount of housework as men, and for married mothers this is 1.9 times that of married fathers. Even women in senior leadership positions who have male partners are five times more likely than their partners to do all or most of the household work.



Women experience higher levels of work family conflict than men and – linked to this – women are twice as likely as men to limit their work commitments. Individuals in partnerships with female breadwinners and/or men as primary caregivers can face additional challenges, which are largely a product of culture (national, industry and organizational).

Work-related travel and relocation can be hard for couples to navigate. “Trailing spouses” are people who relocate for a partner. Some couples may choose to set one career aside temporarily (often it being the woman’s which gets sacrificed as she focuses on settling the family). “Commuter marriages” are when partners live apart while one completes an assignment away from home.



PLAYS TO SUPPORT DUAL CAREER COUPLES

Evidence-based plays to support dual career couples can be categorized into (A) policies/benefits, or (B) workplace culture, mindset & strategy. While plays are listed in a numerical order below, there is no “correct” order for implementation or priority.



POLICIES/BENEFITS

1. Enable flexible work options

2. Offer & encourage paid parental leave & leave for caretaking

3. Support access to affordable, quality childcare & eldercare



WORKPLACE CULTURE, MINDSET & STRATEGY

4. Train managers on why & how to support dual career couples

5. Educate senior leaders about contemporary talent & how to attract / nurture it; Conduct reverse or reciprocal mentoring

6. Develop an Employee Resource Group (ERGs) & provide platforms for employees to discuss challenges, share tips and tools

7. Reevaluate what a successful, ambitious career path looks like & develop geographically flexible options



PUTTING THE PLAYS INTO ACTION

These two pages outline the four steps to put in the preparation, identify the most relevant plays for your organization, and get ready to put them into action.

STEP #1

Assign ownership for who will manage this process / be accountable, **identify what success looks like** (what would the company like to achieve), and **gain support internally**.

To gain support internally:

- Estimate the proportion of the workforce in DCCs. This can be hard to quantify, so it may be useful to use the statistics provided in the introductory section of this Playbook.
- Gather information to communicate why this is important at your particular organization. For example, look at exit interviews to understand how many people have highlighted work-life balance issues and stresses. This information could also be gleaned from engagement surveys or informally gathered from employees in ERGs.

STEP #2

Understand challenges employees in DCCs face and what they appreciate. This information can be gathered through focus group discussions, surveys or interviews. If the organization already has an ERG for parents or DCCs, consider interviewing them or engaging their support as facilitators. Questions to explore may include:








- What challenges do employees in DCCs tend to face? How do these differ across levels? Across different identities (e.g., gender, sexual orientation, age, race, ethnicity)?
- What do employees in DCCs appreciate about how your organization currently supports them and their partner/family? How does this differ across levels and identities?
- Have employees expressed a desire or need for particular support? How does this differ across levels and identities.

STEP #3

Understand the current state of your organization.

Collect relevant information to do a diagnostic of your organization to highlight the most relevant plays. A basic diagnostic is on the next page and are meant to serve as a starting point.

Basic sample diagnostic to identify priority plays for your organization's context

| ASK... | GO TO PLAY... | PLAYERS INVOLVED... |
|---|--|---|
| <ul style="list-style-type: none"> Does your organization have a policy around... <ul style="list-style-type: none"> Flexible work? Do both men and women use flexible work in relatively equal numbers? If no to either question... |  | <p>Diversity, equity and inclusion (DEI) leads / HR</p> |
| <ul style="list-style-type: none"> <ul style="list-style-type: none"> Paid parental leave (including adoption)? Do men use paternity leave and use amounts they are eligible for? If no to either question... |  | <p>DEI leads / HR</p> |
| <ul style="list-style-type: none"> <ul style="list-style-type: none"> Access to affordable quality child care and elder care? If no... |  | <p>DEI leads / HR</p> |
| <ul style="list-style-type: none"> Does your company have a training for managers on helping new parents return to work and supporting use of flexible work? Do employees in DCCs feel the company has a supportive culture for them? If no to either question... |  | <p>DEI leads / HR & managers</p> |
| <ul style="list-style-type: none"> Is there buy-in from senior leaders and understanding that purposefully supporting DCCs is important? If no... |  | <p>DEI leads / HR with junior & senior employees</p> |
| <ul style="list-style-type: none"> Do employees express desire for additional opportunities to connect with colleagues around DCC-related topics? If yes... |  | <p>DEI Leads / HR with employees & leadership</p> |
| <ul style="list-style-type: none"> Does your organization often require or heavily encourage travel / relocation to advance in the company? If yes... |  | <p>Leadership with DEI leads / HR</p> |

STEP #4

Go to the relevant plays, recruit the players needed and put them into action.

Remember, the approach and plays will look different across different countries and geographies given variances in cultural/social norms, as well as the organizational and broader legal environments. Prototype, customize and adapt the play as needed.



SUPPORTING DUAL CAREER COUPLES
PART B. THE PLAYS



ENABLE FLEXIBLE WORK OPTIONS



Flexible work arrangements (FWAs)¹ can come in many forms. It includes flexibility in terms of amount of time working (e.g., part-time), when working can occur (e.g., flexwork), and where working can occur (e.g., telecommuting).

A significant number of employers utilize FWAs and this is increasing. In a 2019 survey of 15,000 respondents across 80 countries, the IWG found that 62% of businesses currently have a flexible working policy, and 75% of respondents believe flexible work has “become the new normal.” Even sectors that historically tend to be more location-delimited such as manufacturing (70%) with industrial plants and factories, or retailers (67%), with stores and warehouses, are seeing more than half of businesses using some degree of flexible working to retain and attract staff.² The number of U.S. workers who telecommute rose 115% between 2005 and 2017 from 1.8 million to 3.9 million workers.³

Flexible work arrangement options can include:

- **Geographic flexibility**
 - **Telecommuting (or flexplace):** work performed remotely only part of the time. Workers can spend all or part of a day, a week or month working at home or at an alternate work location.
 - **Remote working:** work entirely performed away from the office (permanent or temporary position). Employees don't have to come into the office and can live and work anywhere.
- **Working time flexibility**
 - **Condensed workweeks:** a traditional 35- to 40-hour work week is condensed into fewer than five days of work.
 - **Customized working hours (flextime):** flexibility in arrival and departure times. Typically includes a designated core-time mid-day during which all staff are present.
- **Amount of time flexibility**
 - **Part-time positions:** positions less than “full time” (usually defined as <30 hours per week).
 - **Job sharing:** a form of regular part-time work in which two people share the responsibilities of one regular, full-time position (each position at an approximate 50% commitment.)
- **Leave flexibility (or flexleave):** Opportunity to take time off for parts of the year.

Common challenge and solutions

Normalizing the use of FWAs: If “facetime” is used as a proxy for organizational commitment in employee evaluations, taking advantage of certain options (e.g., geographic flexibility) can result in unintended consequences⁴ and has been associated with wage penalties for women who tend to disproportionately take advantage of such options.⁵ *To tackle this it is important for senior leaders/managers to take advantage of these policies themselves, and build a culture that prioritizes performance and results over facetime.*

BUSINESS BENEFITS FROM IMPLEMENTING THIS PLAY*

- Increased **job satisfaction & reduced stress**⁶
- Enhanced **recruitment & retention**^{7 8 9 10}, especially for parents¹¹
- Enhanced **employee motivation**¹²
- Enhanced employee **productivity & reduced absenteeism**¹³
- Positive effects on **company culture**¹⁴

* There remains inconsistency among research in the business benefits, and it's important to understand and acknowledge that different research studies examine different types of FWAs – and indeed business benefits will vary in different contexts.¹⁵ Further, several factors contribute to the success of FWA options in research that has showed positive business benefits including support/buy-in from top management, supervisor support and a supportive organizational culture, among others. For flexible working policies to be effective in reducing work-family conflict and result in improved business indicators, the environment and culture of the workplace must uphold and foster these policies.

Some individuals may be more likely to benefit from FWA than others¹⁶, particularly those with greater work and/or family demands. FWA may be a greater resource for women than for men because women generally bear greater responsibility for domestic tasks than do men.¹⁷ Similarly, individuals with greater family responsibility, such as those who are married and/or who are parents, also stand to benefit more from FWA than those with less family responsibility.¹⁸ Individuals who work longer work hours may benefit more from flexibility than those who work shorter hours in that flexibility provides greater freedom to squeeze more work hours in at the individual's discretion in terms of time and/or place.¹⁹

INDICATORS TO MEASURE SUCCESS *(Disaggregated by gender)*

- Use of flexible work option(s) (% of employees taking advantage of FWAs)
- Morale & job satisfaction (e.g., ask employees if FWAs enhance sense of work-life balance)
- Retention rates
- Absenteeism rates
- Reasons for new employees being attracted to company
- Cost-benefit evaluation (evaluation of financial costs & aggregated benefits to company)

EXAMPLE

Boston Consulting Group (BCG) launched a program initially piloted in 2004 called PTO (predictability, teaming and open communication) which has since spanned to be a global initiative across nine hundred BCG teams in thirty countries. Under PTO, consulting teams set terms for working such as working remote, meeting etiquette (e.g., no meetings before 8 am), expectations for being accessible online, time off and personal goals. BCG has seen improvements in personal satisfaction and project performance. Teams that embraced PTO were more likely to be efficient than those that did not (75% vs. 42%) and individuals on those teams were more satisfied with their work-life balance (62% vs. 38%) and more likely to imagine themselves at BCG for the long term (69% vs. 40%).²⁰



FURTHER READING

- [SHRM research: flexible work arrangements](#) (Society for Human Resource Management (SHRM))
- [Manager guidelines for implementing flexible work arrangements](#) (UPenn Human Resources)
- [Flexible schedules](#) (U.S. Department of Labor)
- [It takes two: How to turn job-sharing into a a promotion.... and another](#) (Wall Street Journal)

STEPS

Players involved: DEI leads & HR

1. Identify which formal flexible work options make sense for your organization and employees. Considerations for employees in DCCs:
 - *Being able to work from home at certain times and have time flexibility can enable individuals to better meet household and care responsibilities. Some employees may also be interested in temporary part-time or job sharing options.*
 - *Remote working can be explored if an employee is moving with their partner to a new location for his/her partner's job (and the employees' job allows it).*
2. Look at local / national laws, understand liability issues and consult your attorney (e.g., ensure compliance with the [Fair Labor Standards Act](#) in the USA).
3. Ensure flexwork and telecommuting employees have all equipment needed for the job. Facilitate remote communication tools and resources (e.g., virtual conferencing).
4. Ensure the FWA option(s) is accessible to employees of all genders (not just women) and conduct a pilot with the identified FWA option(s).
5. Get employee and manager feedback, to then revise as necessary. Ensure manager buy-in.
6. Finalize a policy detailing how managers can implement it and how employees can use it. Include:
 - *Eligibility guidelines: who is eligible and under what circumstances (type of role, attendance record, tenure with the organization and job performance are all factors that might impact individual eligibility).*
 - *Expectations: expectations for how work will get done outside the office, incorporating work hours, communications and home-office needs. It should also spell out use of company devices and networks to ensure protection of the organization's proprietary data and intellectual property.²¹*
 - [Example policy template \(SHRM\); example policy \(Harvard\)](#)
7. Both supervisors and employees should monitor success continuously. As problems develop, adjust as necessary.²²
8. Ensure employees are properly educated on the policy and use of the policy.
9. Train managers on (a) the policy, (b) potential business benefits and value for their team, and (c) how to support all employees (not just women) in using the policy. Importantly, ensure managers and supervisors evaluate performance in employee evaluations as opposed to "facetime". Heavily encourage managers to take advantage of the FWA option(s) and model it themselves.
10. Embed a culture of flexibility.
 - *Encourage managers to allow informal flexibility (e.g., leaving early for a child's soccer game).*
 - *Have leaders establish working norms.*
11. Measure success (see target and indicators) and review the arrangement annually. Business impacts vary based on the context so it's important to track these for your organization and adapt the FWAs as needed for employees and the organization.

OFFER & ENCOURAGE PAID PARENTAL LEAVE & LEAVE FOR CARETAKING



Allowing leave for care is important for caregivers. Leave for care can particularly impact women who tend to be the primary caretakers. If and when men are able to take leave to assist in care, care burdens for women can be reduced. Furthermore, men taking leave to assist care can change norms around gendered expectations for care. Policies that fall under leave for care include: parental leave (maternity / paternity leave), as well as other paid and emergency leave to care for family or dependents.

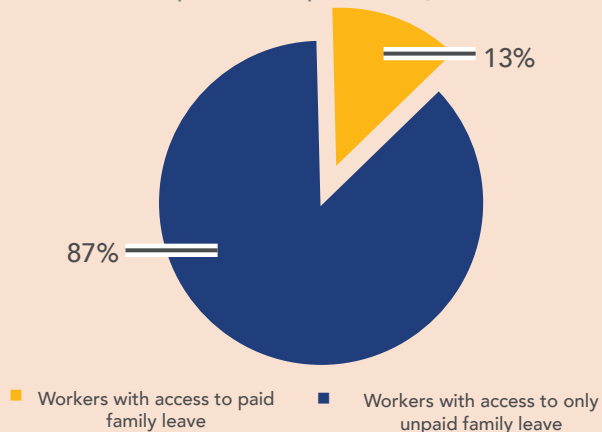
Paid maternity leave is a statutory entitlement for employed women in almost all countries with the exception of the United States, Suriname and Papua New Guinea.¹ Almost all members of the European Union provide at least 14 weeks of paid maternity leave. New fathers are given leave in 92 countries, and in half of these, it's less than three weeks.² The United States is one of only two member countries in the Organization for Economic Co-operation and Development (OECD) that does not guarantee paid parental leave to fathers.³ Job protection to support parental leave is fundamental for the use of parental leave.

Parental leave in the US

In the US, new parents (of any gender) rely on federal law – [the Family and Medical Leave Act \(FMLA\)](#) to protect their job for up to 12 weeks after a birth or adoption. It also can be used to care for an immediate family member with a serious health condition. FMLA does not guarantee any pay during this 12-week period. Further, FMLA does not apply to everyone.⁴ Twenty-five states have leave supplementing FMLA protections and as of 2019, states that mandate paid family leave are California, New Jersey, Rhode Island, New York state and Washington.⁵ Median maternity leave taken in the US is 11 weeks versus paternity leave of 2 weeks (including paid and unpaid).

According to the Bureau of Labor Statistics, National Compensation Survey in 2016, only 13% of workers in the US (2016) have access to paid family leave (for 87% it is unpaid), see figure 1– with variance by size of company⁶ and industry.⁷ Of part-time workers, only 5% have access. Overall, the lower the wage, the less likely one is to have paid family leave (4% for the lowest 10% of wage earners, and 24% for the highest 10% of wage earners).⁸ Many employees may receive some pay during leave, but without paid family leave this is largely from vacation days, sick leave or paid time off (PTO). Nearly half of low-income workers who take unpaid or partially paid leave turn to government benefits to get by, while a larger percentage take on debt.⁹ Indeed, women who took time off in the US after giving birth are more likely to be married, white, better educated and more financially well off than the typical mother.¹⁰

Figure 1. Full-time workers in the US that take paid vs. unpaid family leave



Important considerations for a parental leave policy: ideal time & non-transferable leave

While there is no clear amount of “ideal time” for maternity leave in the literature (from an overall health, welfare, economic and business perspective), there is some evidence regarding length of maternity leave and impacts on child development¹¹, individual well-being¹², future employability, wages and gender roles.¹³ An analysis of existing literature (refer to endnote 14 for the body of evidence) suggests that six months of maternity leave strikes the right balance in terms of mothers’ participation in the labor market, with longer leave resulting in decreased wages and occupational segregation after return.¹⁴ The [ILO’s Maternity Protection Convention, 2000 \(No. 183\)](#) is the most up-to-date international labor standard on maternity protection and provides for 14 weeks of maternity benefit. The convention stipulates that women on maternity leave should be entitled to a cash benefit no less than two thirds of her previous earnings or a comparable amount.

There is a lack of research on “ideal time” for paternity leave. Additional research is needed on this, in addition to transitions back into the workplace that support care responsibilities.

Regardless of leave time, it’s important that leave for fathers is ‘non-transferable’. Non-transferable leave means that if the father does not take advantage of the paternity leave (or of his portion of the parental leave), the total leave period is shortened and the family thus loses out (“use it or lose it”). This is important to potentially reduce stigmas around leave-taking¹⁵, ensure that fathers are encouraged to take leave¹⁶, and promote a range of benefits for children and gender equity in caretaking.^{17 18}

Common challenges and solutions

If parental leave is not paid or if there is hostility when individuals use parental leave – particularly paternity leave – employees may not use leave or use all of the leave they are entitled.¹⁹ The return to work period is also very important to ensure it doesn’t hurt individuals’ careers – and many firms are failing to support talent, particularly women, whose careers can be particularly derailed after returning from leave. In many firms, parental leave is viewed as a major disruption and upon returning to work, colleagues – including managers – may harbor unconscious biases and professional relationships can deteriorate.²⁰ Indeed, a study of a paid family leave program in California found that women who took advantage of the program (launched in 2004) ended up working and earning less (averaging \$24,000 in cumulative wages lost) a decade later.²¹ This illustrates that offering paid leave is not enough in and of itself. Addressing challenges requires explicit strategies including making new parents’ transitions back into the workforce smoother.

Return to work strategies

Return to work is a critical time for new parents and one in which firms are at risk of losing out on key talent if a proper support system is not in place.²² Priority areas to focus on:

- **Lactation rooms & adequate breaks for new mothers:** For mothers, the provision of lactation rooms is critical, and there is often legal guidance for employers.²³ According to the 2019 SHRM Benefits report, there has been a 6% increase over the last five years in onsite mother’s rooms and lactation support services offered, with 51% of companies currently offering them.²⁴ However, it’s important to ensure not just that lactation rooms are available, but there is adequate time for breaks for women to use them and that there is enough space for the demand. Furthermore, given that many working mothers travel for work, firms should consider paying for and helping ship breast milk home while on business travel.²⁵ Firms are also innovating with mobile nursing pods.²⁶

- On-ramping programs for new parents:** To help new parents return to work, employers can explore phased returns. This can include, for example, “check in days” during leave and a gradual part-time return that ramps up to full-time over time. In addition, employers can consider providing coaching or mentoring to new parents during the transition period. Mentors could include high performers who are more experienced caregivers. Alternatively, consider group coaching or informal buddy systems.²⁷

Return to work policies / programs can be stymied if managers do not know about or understand the policies / programs and their own biases can come into play with negative repercussions for individual employees and the organization. It is therefore important for managers to be trained on supporting parents in returning to work (see EFL Play #4).

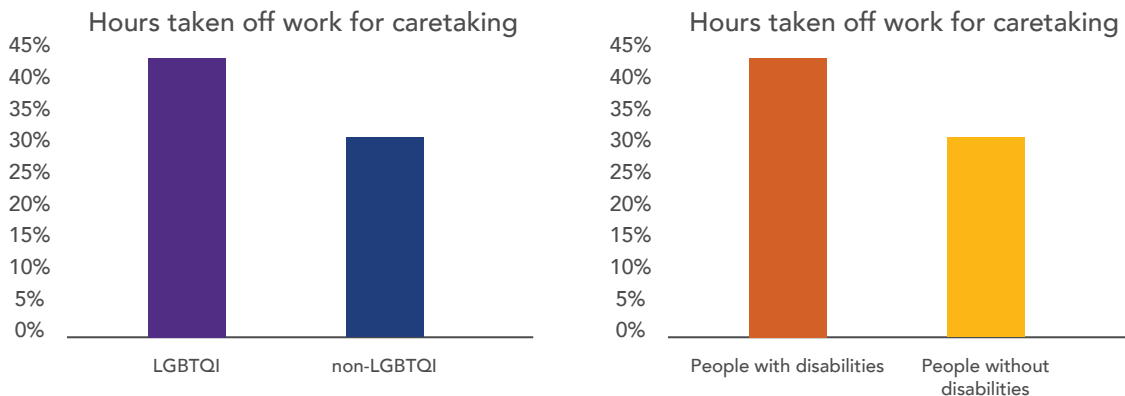
Note: In addition to supporting new parents who return to work after leave, employers can explore paid “returnship” programs which can enable employers to tap into new talent that has taken longer periods of absence from the labor force (typically several years). These typically last for a period of eight weeks to six months, and offer returnees additional training and mentorship as they refresh their skills and can be evaluated as potential full-time employees.

Considerations for LGBTQIA+ & people with disabilities

Oftentimes, parental leave policies (and research around these benefits) primarily address heterosexual couples²⁸ with limited leave policies disproportionately impacting gay dads and adoptive parents. Importantly, there is variability in the extent to which paid parental leave provisions cover same-sex couples – some countries are proactive in ensuring legislative language is inclusive of different family types, while others use gendered language (possibly in attempting to ensure that mothers have enough leave for recovery or promote fathers’ more equal involvement in caregiving). Even if well intentioned, this language can disadvantage same-sex parents when explicit provisions for same-sex parents aren’t made.²⁹ Seven in 10 LGBTQ Americans live in states that lack a family leave law or have a law that only allows leave for workers who have a biological or legal relationship with the child.³⁰

Furthermore, 32% of people in the US report having taken time off work to care for a friend or chosen family member with a health-related need. Data shows LGBTQ individuals and people with disabilities are significantly more likely to report taking this time than others (42% of LGBTQ vs. 31% of non-LGBTQ individuals; and 42% of people with disabilities vs. 30% of people without disabilities) - see figure 2.³¹ This highlights the need for policies that recognize caregiving for chosen family.

Figure 2. Data shows that LGBTQI individuals and people with disabilities are significantly more likely to report taking time off to care for a friend or chosen family member



Leave for elder care

Outside of parental leave, it's also important to consider growing elderly populations. The number of people involved in informal caregiving of older adults is expected to rise. In the US, 15% of the population was ages 65 or older in 2015, and projections suggest that by 2050 about one-in-five (22%) Americans will fall into this category.³² Having emergency leave, paid family leave and paid leave to care for sick family members and/or using one's own sick time to care for sick family members is key.

BUSINESS BENEFITS FROM IMPLEMENTING THIS PLAY

Various research has been conducted on business benefits, particularly related to maternity leave. Parental leave has been shown to result in:

- **Enhanced retention**^{33 34 35 36}
- **Enhanced recruitment**
- **Enhanced employee morale**

Paid leave in particular also been shown to result in positive effects or no effect on **productivity, profitability and morale**.^{*} The California Paid Family Leave Program (launched in 2004) is structured as an insurance scheme funded by employee contributions with no direct costs to employers. From a random sample of 253 firms, stratified by size, employers reported that paid family leave had a positive effect on or no noticeable effect on productivity (89%), on profitability (91%), on turnover (93%), and morale (99%). Most employers (87%) reported no cost increases associated with the program, and 9% reported cost savings via reduced turnover or reduced benefit costs.

** Business benefits can vary based on the type of leave in addition to the industry, size of the company, demographics of employees, how the leave is structured / paid for, etc. Costs associated with paid family leave can include hiring a temp to cover the person who is out, potential decrease in productivity and covering full benefits while the employee is out or working part time. Losing talent, however, is also expensive.³⁷*

INDICATORS TO MEASURE SUCCESS *(Disaggregated by gender)*

- Use of leave option(s) (% of employees taking advantage of leave for caretaking)
- Retention rates
- Reasons for new employees being attracted to company
- Cost-benefit evaluation (evaluation of financial costs & aggregated benefits to company)

EXAMPLE

In IKEA's home country of Sweden, new parents are entitled to 480 days of leave per child that parents can share, with 390 of those days being paid at 80% of salary by the government. However, given that not all the countries it operates in have the same legal / social frameworks, IKEA tailors its parental leave and leave for caretaking policies to address needs specific to each country. The following examples demonstrate some of the practices IKEA has adopted across the globe.



In the US, despite the lack of national government subsidies / laws requiring companies to provide paid parental leave, IKEA offers up to 16 weeks of paid parental leave (includes mothers and fathers who are birth, adoptive or foster parents) for full-time employees, and up to 12 weeks for part-timers. The percent of salary paid varies during leave and depends on tenure at IKEA. While the length and pay amounts are not particularly unique among large corporations – what is particularly unique is that all workers are now eligible – not just top tier, salaried, and/or full-time workers.³⁸ In the US without national governmental subsidies for workers' pay in parental leave, IKEA executives see the "multimillion-dollar" cost of the program as an investment in a more productive and longer-tenured workforce. Lars Petersson, head of IKEA's US operations said, "We're convinced there will be a big payback" from the program over time.³⁹

In Russia, IKEA protects female employees on maternity leave (up to 140 days by law) by granting an additional monthly pay to the allowance that they receive from the State in order to guarantee their average normal salary. IKEA Russia also offers additional paid days off for fathers within the 1st month following the child's birth.⁴⁰

FURTHER READING

- [Family and Medical Leave Act](#) (U.S. Department of Labor)
- [Paternity leave 101: Laws, rights, and other basic things you should know](#) (Fairygodboss)
- [States impose paid family leave as congress weighs national policy](#) (SHRM) – overview of state and federal current and potentially upcoming legislation on family leave
- [How companies can ensure maternity leave doesn't hurt women's careers](#) (Collings et al (2018), HBR) – outlines recommendations for HR leaders and line managers
- [Enforcement guidance: Pregnancy discrimination and related issues](#) (US Equal Employment Opportunity Commission (EEOC)) – legal guidance from the US EEOC
- US – [Family leave laws](#) (Movement Advancement Project) – Map that outlines family leave laws including for same-sex couples.
- [Paid family leave pays off in California](#) (Harvard Business Review)



STEPS

Players involved: DEI leads & HR

1. Look at local / national laws to understand what is required legally. Review existing leave policies for alignment with statutory mandates. Understand what the leave policies might affect and the financial requirements.
2. Implement a gender-neutral parental leave policy for biological, adopted and surrogate children and ensure inclusive of different family types / identities. Build in the following:
 - *Ensure leave is non-transferable between parents (individual entitlements for each parent offered as “use it or lose it” to encourage both men’s and women’s caregiving and supports a diversity of family structures).*
 - *Ensure leave is paid according to each parent’s salary. Adequate pay increases men’s uptake of leave. Also, without pay many individuals cannot afford to take it.*
 - *Build in adequate length (see previous section on parental leave length considerations).*
 - *Include job protection.*
 - *Avoid different leave for “primary caregiver” and “non-primary or secondary caregiver” to ensure not perpetuating gender stereotypes and avoid litigation risks (potential violation of Title VII in the US).⁴¹ Any additional leave, explicitly for mothers in the US, should be tied to a “medical disability related to pregnancy, childbirth or related conditions” to ensure not violating Title VII.*
 - *Consider how to adapt the policy to be inclusive for workers of all kinds – including workers that are part time, seasonal, short-term or under contracts.*
 - [*Parental leave policy example template*](#)
3. Provide return to work support and ensure supportive company culture so that people that take leave are not punished or careers not negatively impacted by taking leave (see box on return to leave strategies).
4. Implement other leave policies to care for family and dependents (e.g., emergency leave, sick leave for caring for family / dependents / chosen family). Ensure support of diverse caregivers and caregiving (e.g., same-sex, opposite-sex, adoptive and single parents, parents of children with disabilities)
5. Ensure employees are properly educated on the policies and use of the policies. Encourage and incentivize employees to use the policy. Even if a policy exists, if employers, managers and peers discourage its use, men (and many women) will not take it.
6. Train managers on the policies, why they are in place, the value for their team, and how to support employees in using the policies (including modeling it themselves) – particularly related to parental leave and parents returning to work.
7. Measure success (see target and indicators), get employee / manager feedback and review annually. Business impacts vary based on the context so it’s important to track these for your organization. Adapt policies as needed.
8. For US companies: Companies can advocate for paid parental leave legislation at the state and national level. There is various [*potential legislation in the pipeline*](#).

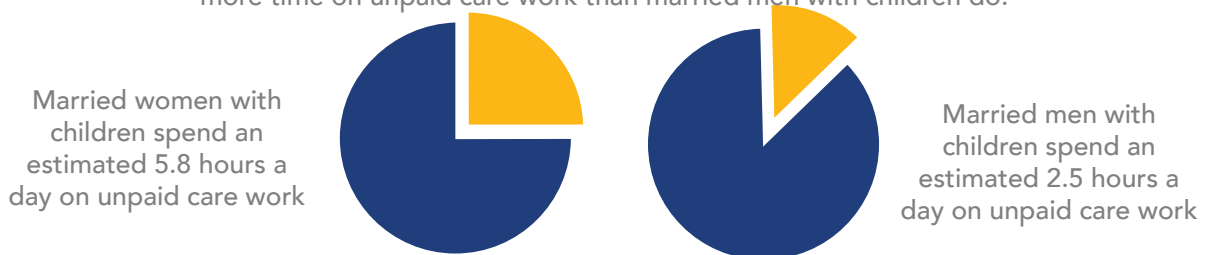
SUPPORT ACCESS TO AFFORDABLE, QUALITY CHILDCARE & ELDERCARE



Providing support for childcare and eldercare can reduce care burdens and time constraints for employees (particularly women) with positive repercussions for organizations they work for.

Globally, women conduct 3x as much unpaid care as men – which includes everyday household chores and tasks of looking after children, attending to the elderly, cooking, cleaning and more. This equates to an estimated 7 years more than men over a lifetime.¹ In developed countries, married women with children spend 2.3x more time on unpaid care work than married men with children - see figure 1.² Specific to caring for aging relatives: In the US, more than one in six Americans who work a full- or part-time job help care for an elderly or disabled family member, relative or friend (with women, low-income and less-educated Americans being more likely to be caregivers).³ This burden of care is only getting heavier as Americans live longer and working-age adults make up smaller share of the population.⁴

Figure 1. In developed countries, married women with children spend 2.3x more time on unpaid care work than married men with children do.



Unpaid care responsibilities affect quality of participation, pay and progression in the workforce for employees. Indeed, caregivers in the US working at least 15 hours per week indicate that this assistance significantly affects their work life.⁵ Compared to other demographic groups, low-income workers, minorities, and women are more likely to reduce their work hours or leave the workforce because of their caregiving role.⁶ Further, women with higher housework responsibilities are more likely to enter flexible, part-time or informal jobs. Women are also 10-20% more likely to drop out of the workforce after having a child, often citing the lack of quality affordable childcare as a reason.⁷ Globally, mothers earn 20-40% less on average than non-mothers, a phenomenon often referred to as the “motherhood penalty”.⁸ American families forgo at least \$28.9 billion per year in wages when they take time off to take care of their children or sick relatives.⁹

It’s not just individuals that are affected: US businesses lose ~\$25bn annually due to absenteeism among full-time working caregivers.¹⁰

To reduce these burdens, it is important to have accessible, affordable, quality care support. There are several options that companies can choose from in supporting childcare and eldercare. These include:¹¹

- Providing subsidies for childcare and eldercare¹² or other financial support¹³
- Securing reserved spaces in private childcare centers¹⁴
- Providing referrals for childcare and eldercare provision¹⁵
- Having an on-site or near-site company childcare center(s)¹⁶
- Partnering with other companies to provide a childcare facility in a more cost-effective manner or fund an existing center¹⁷

- Joining a public-private partnership (PPP) whereby companies partner with governmental organizations to expand the supply of childcare and/or eldercare

There is no one-size-fits-all solution, and selection of which option to pursue depends on a number of factors – both internal to the company (e.g., size of company, employee demographics and needs, desires of the company as well as investment available) and external (e.g., local conditions such as availability of accessible, affordable quality care services). If there are affordable, accessible, quality care services for employees then providing subsidies, securing reserved spaces and/or providing referrals may be appropriate. If there are not, then exploring a childcare center, partnership with other companies to provide childcare and/or eldercare or a PPP may make the most sense.

Resources required vary among the different options – very low for referrals versus high to provide on-site childcare. While providing a childcare facility for employees is more resource and cost intensive, it can also produce business benefits. However this more resource intensive option isn't necessary to achieve desired business results. If there are affordable, accessible quality care options for employees then referrals or other aforementioned options can still be effective for employees and businesses.

Outside of formal care provision, companies should consider supporting intermittent care needs that can decrease absenteeism and positively impact work-life balance and satisfaction. Care needs continue as children get older and enter school -- even as they transition to middle and high school.¹⁸ Intermittent care need support can include **school vacation care**¹⁹, **emergency and back up care services** (*more information in the EFL Parental Leave Play*)²⁰, and/or **allowing employees to bring their children to work**.²¹ Companies can also offer employees access to advisers around caregiver needs and plans.

While women do take on a higher proportion of unpaid care burdens, it is important - regardless of which benefit options the company offers - to ensure that benefits are gender neutral and accessible to all employees in order to avoid reinforcing stereotypes around women's roles as primary caretakers.

Concierge services as an optional add-on to support unpaid care responsibilities

Some companies are adding concierge services to help employees with their unpaid care responsibilities (i.e. household chores and tasks) in hopes to reduce work-family conflict and enhance work-life balance. Concierge services can include dry cleaning, meal catering, home care arrangements for dependents, automobile services, etc.—the exact portfolio differs by firm. Employees pay for the actual end service (e.g., dry cleaning), while firms can cover the concierge benefits either by hiring their own company concierge to coordinate the services or contracting with a vendor who specializes in these services.²²

There is limited academic research on business benefits of these services, but a study of concierge services offered at Bronson Methodist Hospital saw a reduction in turnover rates and an increase in employee satisfaction that occurred alongside a 381% increase in utilization of the services over four years.²³ According to the 2018 SHRM Benefits Study, 3% of employers offered concierge services and in 2016,²⁴ almost one-third of [Fortune's 100 Best Companies to Work For](#) offered them. While these cannot stand alone as alternatives to child and eldercare support policies, they are quickly emerging as viable enhancements for companies that have the resources.

Considerations for LGBTQI+ & people with disabilities

Oftentimes, family caretaking policies (and research around these benefits) primarily address heterosexual couples.²⁵ It is important that all employees – regardless of gender and sexual orientation – can access benefits related to care that is equal and free of stigma and discrimination. For employees with children with mental and/or physical disabilities, consider how to integrate their needs into childcare benefits. *More discussion on people with different identities taking leave for care – and importance of inclusive*

family definitions – can be found in the EFL Parental Leave Play.

Low-income working families may be further constrained by limited resources, fluctuating work schedules, nontraditional hours, lack of access to childcare information and inflexible work policies.²⁶ Finding good care can also be particularly challenging in some low-income communities due to limited supply of quality care.²⁷ Immigrant families, particularly those from large Latino populations, have been found to struggle to find childcare and often these families are unaware of childcare options in the community.²⁸ Other studies have found similar difficulties for other immigrant families, including African and South Asian immigrants.²⁹ It is important to therefore understand care challenges for different workers, and how those can be supported.

BUSINESS BENEFITS FROM IMPLEMENTING THIS PLAY:

Provision of childcare are linked to business impacts* of:

- Enhanced productivity³⁰
- Reduced absenteeism & enhanced retention³¹
- Enhanced organizational commitment³²
- Heightened job satisfaction
- Reduced job stress (Note: positive business trends result in part because childcare and elder care provision are expected to reduce stressors related to balancing work and family due to reduced work-family conflict)

While specific research on eldercare is more sparse, positive benefits also exist in the literature. One survey of employers in the USA, found that the majority of employers reported that elder care services:

- Decreased absenteeism, reduced job stress and boosted productivity.³³

** Although the majority of research highlights positive business impacts, there are several studies with conflicting findings. For example, Kossek and Nichol (1992) and Thomas and Ganster (1995) found no significant effect of the use of childcare centers on absenteeism, Glass and Riley (1998) found no significant impact of employer childcare assistance on retention following pregnancy. Indeed, results vary across organizations and industries. To realize business benefits, it's important that company culture both accepts and supports use of benefits related to care.*

INDICATORS TO MEASURE SUCCESS *(Disaggregated by gender)*

- Use of caretaking option(s) (% of employees taking advantage of caretaking support)
- Retention rates
- Absenteeism rates
- Reasons for new employees being attracted to company
- Cost-benefit evaluation (evaluation of financial costs & aggregated benefits to company)

EXAMPLES

Patagonia provides employer sponsored onsite childcare at their headquarters in Ventura, California and their distribution center in Reno, Nevada. With the capacity to serve over 250 children between the ages of 3 months to Kindergarten, the program has had positive impacts for individual employees as well as the company more broadly. Employees who participate in onsite child care pay average market tuition rates with the company subsidizing quality programming like low adult:child ratios and small group sizes. The company has found that it recoups 71% of their investments in onsite child care with 30% recouped through tax benefits, 30% recouped because of low turnover and cost savings in recruitment, training, and relocation expenses, and 11% recouped through increased employee engagement and job satisfaction. In addition to onsite child care in the US, Patagonia provides child care stipends to over 40 retail employees per year to help offset the cost of quality child care. Patagonia celebrates that 99% of working mothers return to work after maternity leave and that women represent 50% of the workforce at all levels of the company from managers to the board room.³⁴



In October 2018 **Starbucks** enhanced its care benefit policy in partnership with [Care.com Inc.](#) and made it accessible to all 180,000 employees – regardless of how many hours they work. The benefit allows employees to receive 10 subsidized backup days of childcare and eldercare. With the subsidy, center-based backup child care costs \$5 per day, and in-home backup child or elder care at \$1 per hour. In-home care can be particularly helpful for parents/caregivers with lower earnings who may be working evenings, weekends or variable hours outside of center hours.³⁵ The benefits also include senior care planning, in which employees can connect with a senior care advisor for guidance and planning support related to long-term caregiver options, housing alternatives, finances and legal concerns.³⁶ Lastly, employees have premium membership to Care.com which is an online marketplace to find and manage family care that has nearly 30 million members in 20 countries.³⁷



The policy change has implications for reduced absenteeism and enhanced productivity by enabling employees who might otherwise miss work or have to find alternative care when regular care arrangements aren't available. As Ron Crawford, Vice President of benefits at Starbucks puts it: *"We felt like it was important to make this accessible... We wanted to have as low a possible cost [for employees]."*³⁸ This change comes after Starbucks [updated its parental leave policy](#) in 2018, which included expanding paid parental leave to all employees (although not all employees have equal leave amounts).

FURTHER READING

- [Tackling Childcare](#) (International Finance Corporation)
- [Global best practices: Care provision in the private sector](#) (International Center for Research on Women)
- [Why aren't more women working? They're caring for parents](#) (New York Times)
- [Unpaid eldercare in the United States](#) (Bureau of Labor Statistics)
- [The three faces of work-family conflict](#) (Sloan Work and Family Research Network)

STEPS

Players involved: DEI leads & HR

1. Do your background research:
 - *Understand the community, regulatory and legislative context (e.g., government mandates, government programs, community partners, local childcare market, taxes and subsidies).*
 - *Talk with employees or conduct surveys and/or interviews to fully understand care needs and availability / accessibility of quality childcare and eldercare options for employees – and how those needs differ among different employees.*
 - *Review business goals and resources available to identify which care provision may be best in the particular context. The business case associated with each benefit option varies by geography and effectiveness of implementation.*
 - *Note: This data may need to be disaggregated by both sex and region (for companies with multiple offices)*
2. Based on the external environment, employee needs, business goals and resources available identify which option(s) to pursue (outlined in the above list) – incorporating an option for both childcare and eldercare even if the care support looks different. Ensure care benefits are gender neutral and accessible to employees regardless of their gender and sexual orientation. Although this playbook is focused on dual career couples (i.e. white collar), it is recommended to explore how care support can be provided or extended to all workers (e.g., shift workers, clerks, etc.) – recognizing that for different segments of workers, this may mean providing a different support option (e.g., referrals, subsidies).
3. Integrate support for intermittent care needs – such as school vacation care, emergency and back up care services (more information in the EFL Parental Leave Play) and/or allowing employees to bring children to work.
4. Consider offering concierge services to support unpaid care responsibilities (e.g., dry cleaning, meal catering) depending on employee need and resources available.
5. Solicit feedback from employees, share good practices with peers and seek guidance from experts.
6. Pilot the program and integrate the strategy into broader corporate objectives, such as diversity and inclusion for business growth.
7. Train managers and workers – supervisor support is critical to effectively implement policies related to care provision.
8. Set baselines and establish metrics to assess impact (for individual employees and the business) over time.
9. Consider joining public-private partnerships and lobbying the government to enhance care support. The government can put in place policy and regulatory frameworks that enable the private sector to better accommodate the care needs of workers. The government has a key role to play to create incentives that foster employer-supported initiatives and build the capacity of quality and affordable childcare providers.

TRAIN MANAGERS ON WHY & HOW TO SUPPORT DUAL CAREER COUPLES



Policies designed to support dual career couples and promote diversity, equity and inclusion (e.g., flexible work arrangements, parental leave) can get blocked or stymied at the managerial level. Individuals have unconscious biases and may be unaware of how their actions can reinforce gender norms – such as a manager who does not promote a man who just took his full paternity leave even though he was deserving of the promotion.

Managers (mid- and senior-level) must be aware of their own biases so they can start to proactively address them. Organizational leaders are particularly critical in supporting diversity, equity and inclusion in the workplace. Organizational leaders encourage, maintain and help enforce (formally or informally) policies and procedures that provide support for all individuals to succeed in the workplace. This means not only ensuring that policies and procedures that support equity exist, but also that people feel comfortable taking advantage of them without fear of repercussions to their careers. Workers may feel more comfortable asking to take advantage of policies such as flexible work or parental leave when they perceive their managers as family supportive. In a non-supportive work environment, employees who ask to take advantage of these policies may experience backlash from their manager or other employees. Research has found that stress caused by this (and by the perception there is no flexibility to rearrange schedules) may be a contributing factor in work-family conflict.¹

Additionally, organizational leaders drive their organization's culture. Through their own behaviors and actions, they can demonstrate that they believe in gender equity, and create conditions and processes that encourage lower level managers to do the same.² Although organizational leaders cannot and should not be held responsible for actually changing the attitudes of their individual employees, they are responsible for creating a workplace environment where employees can thrive and the business can succeed.

Topics that should get covered in a training for dual career couples:

- ✓ What dual career couples are and the predominance of employees (especially millennials) in dual career couples today
- ✓ Policies in place to support dual career couples (e.g., flexible work) and why they are important; also how to encourage employees to take advantage of the policies and the importance of modeling them / utilizing the policies personally
- ✓ How to support parents before, during and after returning from leave. This includes developing an open dialogue with employees before leaving for parental leave and communication preferences while on leave and the return phase; also making a plan for handovers at the start and end of leave.³ It also includes encouraging all employees - particularly men - to take parental leave.
- ✓ How to adapt expectations that career-oriented employees need to work long, inflexible in-person hours^{4 5}
- ✓ Gender stereotypes and unconscious biases specific to DCCs and parents in the workplace
- ✓ Not placing emphasis on face time as a proxy for ambition or organizational commitment & performance reviews

Other key training topics for managers to promote diversity, equity and inclusion:

- ✓ The [business case](#) for diversity, equity and inclusion
- ✓ Understanding how certain identities have more privilege and power than others, and how inequities can be perpetuated (oftentimes inadvertently) in the workplace
- ✓ Stereotypes and disrupting stereotypes in the workplace through growth mindsets* (including related to gender, race / ethnicity, sexual orientation and other marginalized identities)
- ✓ Unconscious biases (including what they are, how they manifest, how to tackle them)
- ✓ Addressing micro-aggressions and practicing allyship
- ✓ Understanding [language of equity fluent leaders](#) – including terms to avoid and preferred terms
- ✓ Policies in place at the organization to promote gender equity – as well as how to support employees in taking advantage of these policies

Research highlight!

People hold self-perceptions about themselves, called mindsets, related to their personal and professional lives – consciously and sub-consciously. Organizational leaders' mindsets around gender impact their ability to lead effectively, and also affect their organizations more broadly.

Research led by Dr. Laura Kray at UC Berkeley finds that leaders and companies can be more effective if they embrace a "growth mindset" that equally values masculine and feminine forms of influence and power (vs. a fixed mindset). A growth mindset around gender recognizes that gender roles are malleable and requires building equal appreciation of both masculine and feminine forms of influence. For example, equally appreciating traits that due to gender stereotypes are typically associated with women (e.g., empathy, trust building) and those typically associated with men (e.g., leadership). With a growth mindset around gender, leaders can recognize that men and women are equally suited for all types of roles in society whether it be a breadwinner, caretaker or something in between.⁶ While it's important that this mindset comes from the top, mindset shifts are important for managers and leaders at all levels of an organization.

Ultimately, possessing this growth mindset around gender can make individuals better leaders and better able to support their employees. Further, additional research shows that leaders in organizations are particularly influential in shaping and reinforcing employees views about what the organization values and its culture.⁷



BUSINESS BENEFITS FROM IMPLEMENTING THIS PLAY

Managers with more egalitarian views about gender equality and flexible work are shown to:

- **Recruit the most talented staff & retain talented staff⁸**
- **Better capitalize and support diverse talent***

* Men in traditional relationships may have mindsets around women in the workplace that impede gender DEI efforts – revealing the importance of training and its business benefits. Research reveals that employed men in traditional marriages tend to (a) view the presence of women in the workplace unfavorably, (b) perceive that organizations with higher numbers of female employees are operating less smoothly, (c) perceive organizations with female leaders as relatively unattractive, and (d) deny qualified female employees opportunities for promotions more frequently than do other married male employees. Moreover, the research suggests that men who are single and then marry women who are not employed may change their attitudes toward women in the workplace, becoming less positive.⁹

INDICATORS TO MEASURE SUCCESS

(Disaggregated by gender, race/ethnicity if possible)

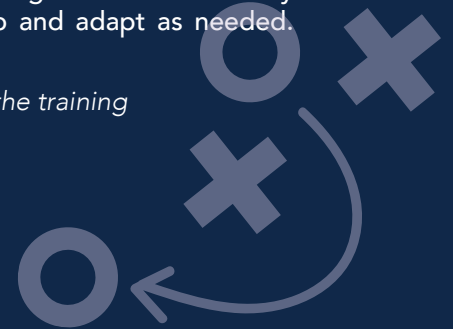
- Use of work-life policy option(s) / benefits (% of employees, by managers, taking advantage of different policies to support work-life balance)
- Retention rates of employees, by managers
- Absenteeism rates of employees, by managers
- Cost-benefit evaluation (evaluation of financial costs & aggregated benefits to company)

STEPS

Players involved:

- Set up- DEI and/or HR team
- Training- trainers (external organization or appropriate internal staff) & managers

1. Get buy-in from leadership.
2. Identify training topics and material – see aforementioned training topics to incorporate (consider a road map of training to introduce training topics over time).
 - *The Center for Equity, Gender and Leadership (EGAL) with the International Center for Research on Women developed a Gender Equity Leadership (GEL) Lab with the aforementioned core training concepts in a one-day training for managers and executives. For more information on the training, contact Genevieve Smith, EGAL Research Director (Genevieve.smith@haas.berkeley.edu). Executive education programs at UC Berkeley also offer trainings on topics of women in leadership.*
 - *Tips for training: Make it clear to participants why the training is occurring – importance to the organization, to them as individuals and to their subordinates / teams; make it participatory; ensure emphasis on actionable strategies.*
3. Secure experienced facilitators.
4. Identify when and where training(s) should occur. Consider incorporating into an existing training instead of introducing an entirely new, additional course, and be mindful of managers' schedules.
5. Recruit managers and leaders to participate in the training, but make it optional (opt-in) with incentives and emphasizing the 'why' they should attend.
6. Implement the training / training road map.
7. Provide follow up support and regular reminders after each training session around key concepts; provide training builds as part of the training roadmap and adapt as needed. These can include:
 - *Recurring communication campaigns on the themes covered in the training*
 - *Reminders of existing policies*
 - *Supplementary panels and other forms of education*



EDUCATE SENIOR LEADERS ABOUT CONTEMPORARY TALENT AND HOW TO ATTRACT / NURTURE IT; CONDUCT REVERSE OR RECIPROCAL MENTORING



Given that by 2025, more than 75% of the workforce will be comprised of millennials¹, it is crucial for companies to bridge the social and cultural divide between them and senior leaders, to understand their priorities and motivations and keep them highly engaged within the corporate landscape. According to EY's 2015 Global Generations study, 78% of millennials are part of dual career couples (DCCs), as compared to only 47% of baby boomers.² It is especially important, therefore, for executive leadership to comprehend the shifting priorities and concerns specific to DCCs and ensure that their interests are represented in company policies and practices.

This education can take various forms, such as: (1) including information about DCCs, their values, and the challenges they face in regular training materials for management or in a panel/seminar format, and/or (2) implementing a reverse mentoring program focused on younger employees sharing aspects of their identities with leaders who are part of older generations. The rest of this brief will focus on reverse mentoring, with details on what it entails and how to set up an effective program.

Reverse mentoring maintains the traditional pairings of junior employees with more experienced executives, but reverses the mentorship structure—the often younger employees take on the role of mentor.³ Although such mentoring was initially implemented in order to 'import' knowledge about technology and digital processes⁴ (social media, apps, etc.), companies are expanding this purpose to include the sharing of social and cultural trends, in effect bridging the gaps created by the "distinctive consciousness" that characterizes each generation.⁵ Reverse mentoring could occur as a stand-alone program or be integrated into existing mentorship relations – such that both individuals in a mentoring relationship are mentors and mentees at different points (also called 'reciprocal mentoring').

Whether or not they are themselves in a DCC, younger employees are likely to be cognizant of the changes in family choices and career advancement decisions that result from being in one. Within the scope of the mentoring relationship, they can educate senior leaders on these aspects, reducing the negative stereotypes potentially associated with them.

Reverse mentoring impacts both individuals in the mentoring relationship, as well as the organization. Younger mentors are able to share pertinent information for business leaders and enhance their communication skills. Executives are able to appreciate the potential in junior employees' individual work values while better understanding values, priorities, and challenges for younger generations in the workplace. In turn, executives can and should inform changes in organizational policies and practices, while modelling a more supportive culture for younger generations of employees in DCCs.

It can also be helpful for junior level employees, particularly those in DCCs, to have mentors who are senior employees that are in DCCs themselves to share their own lessons and strategies. Therefore, in the case of the executive-level individuals being part of a DCC, a reciprocal mentoring relationship can be particularly valuable.

Common challenges and solutions

Navigating perceived undermining of experience / authority: while the reverse mentoring model relies on highlighting and bridging the cross-generational / individual differences between mentees and mentors, potential discomfort stemming from the role reversal may lead to resentment. This, in turn, could exacerbate existing knowledge gaps. *To avoid these pitfalls, carefully outlining respectful communication*

guidelines and discussion criteria are some strategies to keep in mind. To support a culture shift that challenges traditional business hierarchies, it can also be helpful to share guidance on language for equity fluent leaders, including terms to be aware of and potential terms to avoid (see the [Equity Fluent Leadership Glossary of Key Terms](#)).

Avoiding low engagement from upper-level management: executives (mentees) in particular have a larger set of pre-existing responsibilities, and if they remain unconvinced about the value of these additional interactions, they are unlikely to prioritize these meetings. As a result, younger staff (mentors) may fail to see tangible attitude / policy changes, rendering the program ineffective. *To tackle this, the value of the reverse mentoring program should be clearly communicated to participants through a strong business case and ongoing support.*

BUSINESS BENEFITS FROM IMPLEMENTING THIS PLAY

- Enhanced **talent management**⁶
- Increased **recruitment** and **retention**^{7 8} of employees in DCCs⁹
- Enhanced access of young women, minorities, and in this case—people in DCCs, to powerful individuals.¹⁰
- Enhanced **innovation** by bridging technological gaps and heightening understandings of customer trends¹¹

Note: Ideally information obtained in a reverse mentoring program informs organizational policies and practices so that the workplace becomes more supportive for DCCs – doing so can thus better impact aforementioned business outcomes. Further, high engagement on part of the decision-making mentees is necessary to serve as a “signal” of normalizing support for employees in DCCs at an institutional level.

INDICATORS TO MEASURE SUCCESS

(Disaggregated by gender, race/ethnicity if possible)

- Initial participation rates vs. program completion rates of junior-level mentors and executive-level mentees
- Changes in executive-level mentees’ knowledge of younger generations / DCCs post-program
- Job satisfaction of employees that participated in reverse mentoring vs. those who didn’t
- Implementation of new, improved policies pertaining to DCCs (childcare, flexible work, etc.)
- Retention rates and absenteeism rates
- Reasons for new employees being attracted to company

EXAMPLE

In 2013, BNY Mellon's Pershing group launched its reverse mentoring program, CONNECT, in order to provide the firm with "generational perspectives that bring a balanced view of ideas, challenge strategic-tactical mindsets, promote forward progress and attract/retain top talent"¹². Initiated by 2 millennial employees, the program now has around 150 total participants. It is a yearlong commitment that involves regularly scheduled meetings between mentors and mentees (monthly) that foster a direct, confidential reporting relationship, encourages open communication such that insights and feedback can be shared naturally, and eliminates all aspects of hierarchical titles during meetings. Pairs engage as equals in a learning relationship. All millennial mentors also have a monthly meeting during which they discuss various topics to bring back to their mentees. CONNECT publishes quarterly newsletters, laying out topics of discussion, program successes, and upcoming events. Among its successes is the founding of "TechMill", a group of millennials with the authority to work on self-directed initiatives focused on improving the work environment for employees in the tech department.



FURTHER READING

- [Reverse Mentoring: A Social Exchange Tool for Keeping the Boomers Engaged and Millennials Committed](#) (Human Resource Development Review)
- [Mentoring Millennials](#) (Harvard Business Review)

STEPS

Players involved:

- Set up- DEI and/or HR team
- Mentors- junior employees
- Mentees- senior employees

1. Evaluate whether a reverse mentoring component can be incorporated into an **existing** traditional program (thus establishing a reciprocal mentorship approach) or if a **new** reverse or reciprocal mentorship program should be developed. Use the below table to understand the pros and cons.

| OPTION | PROS | CONS |
|---|---|--|
| <p>Existing: Capitalizing on established individual relationships</p> <p>(Follow steps 3, 4, 6, 7)</p> | <ul style="list-style-type: none"> • Both employees will have set time aside for this program and feel little to no additional strain on their workload • Participants may be comfortable flipping the script given the nature of their established relationships | <ul style="list-style-type: none"> • Participants may find it difficult to break out of traditional mentor / mentee roles • Senior employees may be unreceptive to being placed in a learning role |
| <p>New: starting from scratch</p> <p>(Follow steps 2-7)</p> | <ul style="list-style-type: none"> • Participants going into the program will be open to role reversals and receptive to new perspectives | <ul style="list-style-type: none"> • Significant investment of time and resources would be required to set up and get support from senior executives • Participants may be unwilling or unable to allocate time for a new program into their schedules |

2. Secure support from upper-level management¹³, HR/DEI leads, including through articulating the business case for reverse mentoring (see business benefits above); and surveying senior executives to gauge interest and possible time commitments so as to determine the scope of the mentorship program.
3. Consult existing mentorship programs at the organization to ascertain best practices, and create plan of action with the following:
 - *Goals and measurable targets*
 - *Level of formalization and standardization*
 - *Will the program require adherence to a strict meeting schedule, or be open to informal communication once point of contact has been established? While a fixed schedule will ensure that basic participation levels are met, a flexible arrangement may be more organic, with participants being more engaged during meetings*
 - *Having a standard list of potential topics/resource areas to be covered by everyone allows for productive meetings where neither party is blindsided, fostering trust and*

transparency. In addition, the level of formalization can be adjusted by building out a list of required topics that rotate or that simply function as a point of reference.

- *Realistic engagement objectives, including:*
 - *Duration of program (typically 6 months to 1 year)*
 - *Frequency of one-on-one interactions, accounting for both mentors' and mentees' availabilities.*
 - *Potential additional events, such as monthly fireside chats with HR/DEI representatives for all participants to voice new ideas or share new perspectives*
- 4. Establish check-in / feedback timelines: having a system that addresses on-going queries and offers periodic reviews is crucial for success. This includes monthly meetings for mentees to discuss overarching issues they want to bring up to their mentors, and address areas of concern; and periodic check-ins between participants and DEI / HR representatives to gauge whether communication between mentors and mentees needs to be improved or modified.
- 5. Match mentors and mentees. Make sure to match mentors and mentees that do not have a direct working relationship, to prevent bias and create a comfortable environment. If challenges occur within a mentoring relationship, assess ways to broker a way forward and if not, facilitate a clean, no blame conclusion to the pairing, looking into potential alternative matches.
- 6. Organize an orientation event to introduce the program and expectations – including through distributing communication guidelines, outlining responsibilities, emphasizing confidentiality, and ensuring that mentors and mentees are comfortable in their roles
- 7. Monitor progress and collect feedback.
- 8. Compile key learnings from the program and mentees to jumpstart innovations / policy changes at midpoint and end of program duration.



DEVELOP AN EMPLOYEE RESOURCE GROUP & PROVIDE PLATFORMS FOR EMPLOYEES TO DISCUSS CHALLENGES, SHARE TIPS & TOOLS



It is important for employees in dual career couples (DCCs) to have opportunities to discuss their experiences and the challenges they face as well as share tips and tools. This can occur through established, regular in-person meetings (e.g., through Employee Resource Groups (ERGs)¹) and/or through relatively informal or formal virtual communication channels (e.g., Slack, LinkedIn group).

ERGs are formalized, employee-led communities for people of a certain identity – whether that identity is based on a demographic, life stage, or function², and can be key contributors to business strategy and operations. These groups provide professional development, networking, and/or volunteer opportunities to their participants and often benefit from the engagement of executive leaders.³

Support for ERGs has been increasing rapidly, recognized as a step in the right direction when it comes to advancing D&I and impacting culture: In 2013, 90% of Fortune 500 companies had ERGs.⁴

While ERGs focused on demographic factors - particularly gender, race/ethnicity, and sexual orientation -- are the most common⁵, ERGs can also be focused on professional fields or social causes, with characteristics for each type outlined below:⁶

| DEMOGRAPHIC / ATTRIBUTES | PROFESSIONS | SOCIAL CAUSES |
|---|--|---|
| <ul style="list-style-type: none"> Based on demographic factors or other personal characteristics, these are the most common and traditional ERGs. ERGs for dual career couples (DCCs) fall in this category. Members typically join in search of professional development and networking opportunities that are cognizant of their team and organization identities.⁷ Membership is likely to be non-exclusive, with space for allies of the target community to join and contribute to the conversations. | <ul style="list-style-type: none"> Focused on specific professional fields within a company. E.g., ERGs for programmers or engineers at a non-tech firm. Members join in a bid to eliminate hierarchy and bridge the power disparities between leaders and new employees within a functional silo. Centred around employees at a certain level of seniority / stage of career. E.g., ERGs for young professionals, a group that typically has high turnover rates, aimed at helping them acclimatize to company culture and gain a crucial sense of 'belonging'. Membership is likely to be exclusive | <ul style="list-style-type: none"> ERGs supporting a specific social issue (e.g., environmental, literacy) create a network of employees for whom the cause at hand is as important as is connecting through their work environment and branching out of their professional silos. Membership is likely to be non-exclusive, open to everyone advocating for the cause. |

An ERG for employees in DCCs can serve as a platform for participants to discuss challenges specific to being in a DCC in the workplace or at the specific company, and enable participants to share tips, strategies and tools. This could look like discussion forums to provide feedback about existing childcare or parental leave policies at the firm and brainstorm changes that would benefit the community, panels with managers in DCCs sharing advice and resources, and could be augmented by a virtual networking/

chat component. Given that employees in DCCs are already handling multiple responsibilities, it's key to be mindful that ERG activities fit into their schedule and do not add to time burdens.

People in DCCs face different challenges and constraints at different career and life stages. The ERG could develop opportunities for participants in various stages to network, learn and connect with others. For example, the ERG could host a panel related to work-life balance with eldercare responsibilities, supporting teenage children and/or navigating the workplace as a new parent. The ERG could also discuss how parents can [prepare for transitions](#) as children (or other dependents) grow older.

Common challenges and solutions

Avoiding the “superficial safe spaces” trap:⁸ An ERG without a clearly defined mission that fails to go beyond food, fun, and festivities is likely to be perceived as ineffective and masking larger D&I issues. *To tackle this, executive sponsorship needs to translate into adequate support and resources to boost employee engagement and create tangible impacts.*

Affecting meaningful organizational policies and practices: ERGs may not have an impact on organizational policies and practices that can help affect meaningful systems change for the particular identity group. Some firms see “inclusion councils” (formalized groups that welcome all employees but put senior leaders in charge of leading D&I change) as more effective alternatives to ERGs. Deloitte, for instance, chose to make this shift in an attempt to reframe diversity as the responsibility of the ‘in-group’ and have decision makers involved.⁹ *To tackle this, the value of ERGs as platforms for shared voices should be clearly outlined, decision makers should be accessible to their ERGs and voices of those in ERGs should be harnessed to support larger change.*

Addressing potential insularity: exclusive ERGs can alienate groups outside the defined membership, and dissent on this front can reinforce the divisiveness of a company's workforce. *To tackle this, ERGs should encourage allies to attend – an ERG for DCCs should welcome employees regardless of whether or not they are in a DCC.*

BUSINESS BENEFITS FROM IMPLEMENTING THIS PLAY

With the above elements secured, an ERG can lead to the following results:*

- **Enhanced recruitment¹⁰ & retention of diverse talent,¹¹** assuming the ERG represents a community that the target audience can relate to
- **Heightened employee engagement¹²** for individuals participating in an ERG
- **Enhanced professional & leadership development of talent**
- **Improved understanding of & appeal to a wider consumer base^{13 14}**
- **Brand enhancement** (when / if ERGs are volunteering & conducting Corporate Social Responsibility initiatives)¹⁵

**Limited academic research is available on ERGs and their business contributions—other information has been gathered through non-academic reports or specific, sometimes self-reported success stories. Nonetheless, all sources point to a caveat to these business benefits—not only are ERGs only one step in a holistic plan to build an inclusive workforce, but their success is also contingent on being effectively set up, considering the challenges and good practices defined above.*

INDICATORS TO MEASURE SUCCESS *(Disaggregated by gender)*

- Number of new members per year in the DCC ERG
- Number of community events conducted / hosted by the DCC ERG and number of participants
- Whether a top executive(s) is sponsoring the DCC ERG
- Retention and promotion rates of employees in DCCs who are ERG members compared to non-members
- Job satisfaction and sense of work-life balance of those employees in DCCs who are members of the ERG and those who aren't
- Cost-benefit evaluation (evaluation of financial costs & aggregated benefits to company)

EXAMPLES

Gap Inc. has several employee-led [Equality and Belonging Network Groups](#) (their iteration of ERGs). In April 2019, Gap Inc. launched Gap Parents, a network group that strives to 'help working parents thrive', bolstering the progress the company has made with expanding paid parental bonding leave¹⁶ to support working families in 2018. The group facilitates 'Parent Circles', building a parent community through discussion forums on the many transitions of parenthood. The group also recently hosted a panel discussion for employees with leaders in the company who discussed challenges and shared tips about being working parents – often in dual career couples.¹⁷

Gap Inc.

Zendesk has [6 ERGs](#), one of which ("The Village") aims to connect and support working parents and caregivers at the company. This ERG has 325+ members distributed amongst four chapters – in Dublin, Madison, San Francisco, and Melbourne – and is exploring a remote branch to support Zendesk's remote working parents and caregivers.

zendesk

The ERG hosts in-person events, facilitates community volunteering, supports ongoing online communication and connects members to the benefits team to inform policies and practices at the company. In-person events create opportunities for employees to discuss challenges and share resources. E.g., "speed dating" style meetings to share favorite parenting / caregiving resources, panels wherein executive sponsors share advice about achieving work-life balance, and weekend trips to the local zoo / children's museum. Community volunteering opportunities span from participating in a back to school backpack drive for low-income communities to partnering with local organizations to support LGBTQIA+ caregivers. Each chapter has a Slack channel that allows members to connect virtually and facilitate ongoing communication, while also allowing for remote employees to participate. Slack channels include benefits team members who share information about available resources and collect feedback from ERG members.

The ERG is working on a program to match employees who have taken leave with those about to go on leave, to encourage use and offer support with navigating leave policies.¹⁸

Exploring a different communication and support platform for employees in DCCs:

[Circle In](#) is an organization that seeks to “positively impact female workforce participation, by addressing the well-being of working parents and building inclusive workplaces” with two types of platforms for working parents. The first is an open, free platform that compiles and provides information, articles, and stories for working parents. It currently has ~100,000 users. The second is a closed, customized platform for employers (“Circle In for Employers”) that brings together information on policies and benefits, as well as other resources and stories that are disaggregated by different stages of parenthood. The platform includes resources for managers as well on how to best support employees and captures data for the company related to employee engagement, confidence, and advocacy levels. Circle In has found that 82% of users feel more positive towards their organization as a result of their company platform. To date, Circle In has partnered with 14+ brands, including L’Oréal, Coca-Cola Amatil, and Estée Lauder.¹⁹



FURTHER READING

- [SHRM research: Use ERGs to Effect Change, Spark Innovation](#) ((Society for Human Resource Management (SHRM))
- [The case for employee resource groups: A review and social identity theory-based research agenda](#) (Center for Effective Organizations at USC’s Marshall School of Business)

STEPS

Players involved:

- **Set up- DEI and/or HR team**
- **Implementation- Employees, with supervision and support of senior leader(s)**

1. Conduct some research to understand the following:
 - *What challenges do employees in DCCs tend to face? How do those challenges vary among employees of different levels and different gender / sexual identities?*
 - *How can an ERG help employees in DCCs tackle or overcome these challenges, and what should the ERG do?*
 - *Is there interest from employees for a DCC ERG?*
 - *Who needs to be involved for the ERG to be successful?*
 - *Is there other virtual support that could be helpful? (e.g., creating a LinkedIn group, Slack channel)*
2. Articulate a business case for the ERG (see above business case information).
3. Identify activities for the ERG that can help DCCs tackle or overcome their challenges. For example: facilitating discussions with leaders in DCCs on challenges and how they overcame them; getting employee feedback to potentially refine parental leave policies; providing access to tools and resources that make the transition to working parent smoother; facilitating mentorship opportunities for new working parents, etc.
4. Secure an executive sponsor(s) and encourage investment of their time and resources (nonfinancial acknowledgments such as public recognition or participation in forums / panels are motivators for employee involvement and enable participation).
5. Prepare a charter document defining the mission statement, organizational structure (leadership, membership criteria), and alignment of the ERG to the firm's overarching D&I and business goals.
 - *This document is typically prepared by the DEI lead in conjunction with founding members / leaders of the ERG, but feedback from the executive sponsor(s) should be incorporated.*
 - *For a DCC ERG ensure membership is not exclusive, and that people of different gender identities and sexual orientations are invited with content that is relevant to all types of couples. Ensure that events / meetings are held at appropriate times for target individuals to attend.*
 - *Identify specific roles for select members to take on: admin, event planning, maintaining external relationships, etc.*
 - *Include a draft first-year plan of action (make sure to clearly outline expected impacts and measurable KPIs against which success can be gauged), as well as meeting / event schedule.*
 - *Develop a projected budget and secure the budget.*
6. Develop communications materials and build a membership base, ensuring participation is voluntary. Also explore cross-collaborations with other aligned ERGs (e.g., a women's ERG): have open communication channels, occasionally pool resources and co-host events.

7. Identify if and how virtual platforms can provide support (this could be as simple as a Slack channel or LinkedIn group that accompanies the ERG, or a more established platform such as Circle In – see under 'examples').
8. Encourage ongoing engagement and secure a variety of speakers (don't just have C-suite executives leading events). A wide variety of speakers who can address the day-to-day challenges most of the employees in DCCs are living may be more relatable and useful.
 - *For ongoing engagement use the following practices:*
 - *Encourage ERG members to invite their managers to events, to increase awareness and drive up membership numbers*
 - *Distribute concrete schedule well in advance if possible, so ERG members can prioritize ERG events*
 - *Distribute meeting agendas / notes to ERG members who can't attend*
 - *Incorporate video conferencing / live streaming to make virtual attendance at meetings and events possible*
9. Measure success and address challenges. Continually monitor targets; benchmark against previous years. Collect periodic feedback from members and executive sponsor(s); refine approach and incorporate learnings in an ongoing basis
10. Use the ERG to gather feedback on how the organization can better support DCCs and feed this back to leadership to potentially inform organizational policies and practices.

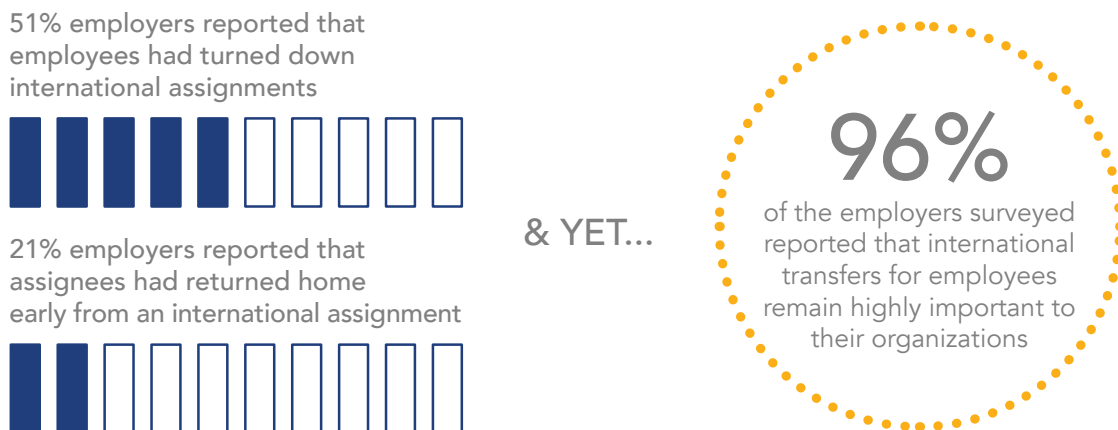


REEVALUATE WHAT A SUCCESSFUL, AMBITIOUS CAREER PATH LOOKS LIKE & DEVELOP GEOGRAPHICALLY FLEXIBLE OPTIONS



While not necessarily explicit, typical talent management tracks across almost all industries perceive geographical mobility as an important precondition for career enhancement. Indeed, most executives in mid- to large organizations continue to be expected to cycle through multiple divisions and locations as they progress up the ladder despite the advent of communication technology that makes virtual work productive and efficient. In fact, a 2011 study showed that 96% of employers surveyed across industries in the private and public sectors report that international transfers for employees remain highly important to their organizations.¹ However, for employees in dual career couples (DCCs), the prospect of relocation is complicated (see figure 1).

Figure 1. A 2011 study of employers surveyed across industries in the private and public sectors measured the impact of DCC employees' concerns over their partners' careers



Employees today in DCCs are increasingly (1) considering the impact of relocation on spouses' careers, and (2) prioritizing a work-life balance that allows them to share childcare and other familial responsibilities with their spouse. So, if firms use willingness and desire to move geographically as a primary sign of ambition it can cause them to lose talented employees at crucial stages of their pipeline. Refusal or hesitation to take on an opportunity can be deemed as "not showing up", resulting in talented employees not being judged based on their capabilities and a pressure to move up or move out.² It is crucial for companies to reevaluate the ways in which they measure an employee's ambition, and to provide more flexible career development tracks that are cognizant of these cultural shifts.

There are two main ways to do this:

- **Shift the focus from "where" to "what":** instead of having an employee relocate, enable them to work remote and gain the skills they would have received had they relocated. This can be done by actions such as the following:
 - Use technology to offer standardized virtual trainings and make virtual teamwork possible.
 - Identify the specific tasks that require physical presence. Doing so can also result in short-

er assignments and make it possible for employees to take on temporary commuter roles³ and other flexible options that don't require drastic long-term changes.

- *Note: This option involves not just offering virtual / flexible arrangements but also reducing the stigma surrounding them.*
- Offer relocation assistance if relocation is essential for individual career development, with a focus on career support for the employee's partner:
 - Enhance the financial support that already exists for care and household responsibilities (e.g., childcare stipends) and include recruitment assistance for the employee's partner.
 - Provide cultural adjustment resources, especially for international assignments.

Of course, making these changes (particularly the first option of shifting the focus from where to what), is more challenging in some industries than others.

Typical career path expectations & working long hours

While this play focuses on geographic mobility, it is key to recognize and reflect on the typical expectation of consistently working long hours (over 8 hours per day) in order to advance -- which is particularly true in certain industries (e.g., banking, finance) and can pose challenges for people in DCCs.

Evaluating if a successful career path can be less time-intensive is challenging and varies across industries. Potential solutions on an individual level can include reduced time expectations and/or job sharing (see EFL Play #1 on flexible work). However, taking advantage of these options can still hold individuals back from advancing in the workplace. Larger structural changes are needed in certain industries -- and conversations have begun: earlier this year the Association for Financial Markets in Europe and the Investment Association [raised the possibility of shorter stock market trading hours](#) to their members.

BUSINESS BENEFITS FROM IMPLEMENTING THIS PLAY

Research shows that providing employment assistance to the spouse of a relocated employee can result in the following:

- **Increased recruitment & retention** of employees in DCCs^{4 5}
- **Increased job satisfaction** & reduced stress⁶
- **Enhanced employee productivity & reduced absenteeism**⁷

While limited academic research exists around the business benefits of reevaluating career paths to reduce / eliminate relocation altogether, anecdotal evidence suggests that the

following benefits may be attained:⁸

- **Increased recruitment & retention** of employees in DCCs
- **Enhanced employee motivation**

Note: An overhaul of perspectives surrounding ambition, success, and mobility (which is necessary for the above business benefits) is difficult to achieve. Senior management may remain inert when it comes to tackling challenges faced by employees in DCCs, by virtue of believing that these problems are personal and shouldn't intersect with their professional lives. There can sometimes be a dues-paying element at play as well, wherein older employees believe that since they were able to navigate challenges in the pipeline, younger employees should too. Lastly, stigma surrounding virtual versus physical presence can prevent flexible options from being adopted. Strategies to mitigate this include educating senior management about changing trends and motivations (EFL Play #5).

INDICATORS TO MEASURE SUCCESS

- Use of flexible alternatives to relocation (% of employees accepting commuter roles, % of employees on virtual teams, etc.)
- Promotion rates / evaluations of employees flexible alternatives
- Retention rates of employees in DCCs
- Absenteeism rates of employees in DCCs
- Job satisfaction of employees in DCCs
- Reasons for new employees being attracted to company
- Cost-benefit evaluation (evaluation of financial costs & aggregated benefits to company)

EXAMPLE

In keeping with the evolving, globalized modern workforce, Cisco is striving to enable people to work together whether or not they are in the same geographical location—as of 2009, 40% of its employees were not located in the same city as their manager. According to Cisco's 2009 report, its Internet Business Services Group generated an estimated annual savings of \$277 million in productivity by allowing employees to telecommute and work on virtual teams. Around 69% of employees surveyed cited higher productivity and 75% said the timeliness of their work improved when working remotely, in addition to which 83% said their ability to communicate with their team was not hindered by not working on-site. Besides improved quality of work, an improved quality of life through telecommuting was also reported by 80% of respondents.⁹



FURTHER READING

- [Dual-Career Expatriates: Expectations, Adjustment and Satisfaction with International Relocation](#) (Journal of International Business Studies)
- [Human resource management implications of dual-career couples](#) (The International Journal of Human Resource Management)

STEPS

Players involved: Organizational leadership with HR & DEI leads

1. Examine and understand your organization's expectations (explicit or otherwise) related to talent management and geographic mobility.
2. Identify which of the two options to pursue (shift and/or relocation assistance), then see below for more information and approaches of each. Your organization may want to take a combined approach of the below, depending on the particular employee and the context.
3. Pilot activities and track key indicators.
4. Adjust as needed

Approaches for 'shift':

- Conduct virtual / standardized trainings that simulate field experience – this involves identifying crucial elements of assignments in other units or geographical areas and using cases, simulations, and other forms of technology to ensure that the learning is available locally and does not require long-term relocation.
- Develop virtual teams – these are work groups where at least some core members (1) interact primarily through electronic means and (2) are engaged in interdependent tasks. Some research shows that well-constructed virtual teams can be more engaged than traditional in-person teams, with remote workers showing higher productivity.^{10 11} While periodic in-person interactions are still required, making this option available to employees in DCCs who would otherwise need to relocate to be with their team(s) allows them not to move and gives them a degree of flexibility. More information on how to set up a successful virtual team with effective communication channels can be found [here](#).
- Provide shorter assignments for employees in DCCs, such as:
 - Commuter roles, complete with commuting allowances and support from management
 - "Strike force" assignments or "secondments"—series of mini-tasks broken into 3-4 month projects as alternatives to longer term relocation

Approaches if employees relocate¹²:

- Monetary assistance to cover relocation expenses (e.g., childcare arrangements, housing allowances) that make transition easier and allow the employee and their spouse to balance work and family.
- Recruitment assistance for the spouse, which can take several forms:
 - Counselling both members of the DCC to give them a realistic understanding of issues and probabilities of finding career employment prior to relocation.
 - Sending the spouse's resume to other divisions or branches within the firm or by leveraging contacts with suppliers, channel of distribution members, agents, etc.
 - Partnering with resources such as the [International Dual Career Network](#), a two-way headhunting service, wherein one can register to receive access to workshops, placement support, and other job seeker services.
- Cultural adjustment resources – in case of an international relocation, providing information on the cultural and social implications of the move can help both members of the DCC build a network and adjust to life in the new area.



CALL TO ACTION

Remember Dawn? She left her job a year after returning from maternity leave. Her employer tried to keep her, but with the work hours, childcare costs, parents starting to needing care and other household responsibilities – on top of her partner making more – it just “made sense”. She is fortunate in that she could step back, as many dual career couples rely on both incomes and may not have this option. Dawn’s is just one story and one illustration of what happens when dual career couples aren’t supported. Supporting all dual career couples - regardless of their gender, sexual orientation, age, race, ethnicity, socio-economic status, and ability status - is an issue that should be top of mind for business leaders today that value a diverse, inclusive workplace.

By understanding challenges dual career couples in their organizations face and implementing the seven plays, business leaders can better attract, keep and grow talent. By doing so, leaders can adjust their organization to a modern workplace that best meets the needs of its diverse employees and communities.

This is what ‘equity fluent leadership’ is all about: understanding the value of different lived experiences and courageously using your power to address barriers, increase access and drive change for positive impact.

It is our goal that this playbook can help guide you and your organization to move towards concrete, meaningful action. As you go along your journey, we hope you share your challenges and lessons learned with us so we can track and update learnings and approaches.

Yours in learning and equity,
The EGAL Team



SUPPORTING DUAL CAREER COUPLES
APPENDIX 1. GLOSSARY OF KEY TERMS



GLOSSARY OF KEY TERMS

Affinity group: This term refers to the original iteration of ERGs, initially created to advocate for diversity and inclusion in primarily white-male workforces. Some firms may still refer to their ERGs as Affinity Groups although the functionalities have evolved over time.

Baby Boomers: The generation born roughly between the early 1940s to the late 1960s.

Commuter marriage: Commuter marriages are a subset of dual career couples, in which the spouses live apart from each other, typically due to having jobs in different geographical locations, and regularly travel to be together (on weekends etc.).

Dual career couples: Dual career couples (DCCs) are commonly defined as couples – with or without children – where both partners pursue a professional career. They are a subset of dual-earner couples and tend to be well educated couples with commitment to their jobs and respect for and interest in their partner's career.

Dual earner couples: Dual earner couples are couples where both spouses are involved in the paid labor force. In such couples, one may be pursuing a “career” in the traditional sense, while the other is not. Blue collar jobs are not usually thought of as careers since as a group they lack a developmental character or progression through patterned job sequences.

Emergency leave: period of approved absence to care for dependents in times of emergency.
Paid family leave: leave granted to an employee to care for a family member (including a new-born or adopted child, a sick child or a sick adult relative) in addition to any sick leave, vacation, personal leave or short-term disability leave that might be available. This term often is used to include paid maternity and paternity leave / parental leave.

Employee Resource Groups (ERGs): ERGs are formalized, employee-led communities that act as a resource for both members and the organization within which they exist. These groups are based on a demographic, life stage, or function, and are key contributors to business strategy and operations. Known by a variety of names including Business Resource Groups (BRGs), they work with executive sponsors to foster a diverse, inclusive workplace that is aligned with the organization's mission, goals, business practices, and objectives. ERGs can provide professional development, networking, and even volunteering opportunities based on the organization they are a part of.

Flexible work arrangements (FWAs): Also known as Flexible Working Hours (FWH) or Flexibility, FWAs don't have a uniform definition and can come in many forms. These include flexibility in terms of amount of time working (e.g., part-time), when working can occur (e.g., flexwork), and where working can occur (e.g., telecommuting).

Gen X: The generation born roughly between the early 1960s to the late 1970s.

Inclusion council: Formalized groups that welcome all employees but put senior leaders in charge of leading diversity and inclusion (D&I) efforts. Some firms view this as an alternative to exclusive ERGs, reframing D&I as the responsibility of the 'in-group' which has the power to enact change, rather than an additional charge for the 'out-group' to take on.

GLOSSARY OF KEY TERMS CONTINUED

Maternity leave: a period of approved absence from work for purposes of giving birth and caring for a new-born (a biological or adopted child) designated for mothers. It can last anywhere from several weeks to a period of months depending on the organization, and may be paid or unpaid depending on policies. The ILO's Maternity Protection Convention, 2000 (No. 183) provides for 14 weeks of maternity benefit and stipulates that women on maternity leave should be entitled to a cash benefit no less than two thirds of her previous earnings or a comparable amount.

Millennials: Millennials refers to the demographic cohort born in between the early 1980s and the late 1990s. 1981 to 1996 are widely accepted as specific cutoff points.

Trailing spouse: Trailing spouses are people who relocate for a partner. Some couples may choose to set one career aside temporarily (often it being the woman's which gets sacrificed as she focuses on settling the family).

Parental leave: a period of approved absence from work for new parents (see 'maternity leave, 'paternity leave').

Paternity leave: a period of approved absence from work for purposes of caring for the new-born (a biological or adopted child) designated for fathers. Non-transfer- able leave means that if the father does not take advantage of the paternity leave (or of his portion of the parental leave), the total leave period is shortened and the family thus loses out ("use it or lose it").

Reciprocal mentoring: Reciprocal mentoring refers to a version of reverse mentoring in which both individuals in the mentoring relationship are mentors and mentees at different points. As junior mentors impart their knowledge about social and cultural trends that affect their work values and motivations, they are able to demonstrate their leadership and communication skills to key decision makers at the company. At the same time, by virtue of their seniority, mentees are liable to provide feedback and resources, creating a mutually beneficial relationship.

Reverse mentoring: Reverse mentoring maintains the traditional pairings of junior employees with more experienced executives, but reverses the mentorship structure—the often-younger employees take on the role of mentor, educating executives on specific topics pertaining to technology and the social / cultural trends of their generation that senior employees may not otherwise access. It is aimed at bridging generational divides to ensure that the interests of the growing millennial workforce are represented through the firm's policies and practices.

"Strike force" assignments / "secondments": A series of mini-tasks broken into 3-4 month projects, as an alternative to long-term relocation.

Virtual teams: These are work groups where at least some core members (1) interact primarily through electronic means and (2) are engaged in interdependent tasks. Periodic in-person interactions are often still required but this set up offers employees a degree of flexibility.



SUPPORTING DUAL CAREER COUPLES
APPENDIX 2. ENDNOTES



ENDNOTES | PART A. PREPARATION

- ¹ Rapoport, R. & Rapoport, R. (1969). The dual career family: a variant pattern and social change. *Human relations*, (22): 1.
- ² Dual earner couples include spouses in the paid labor force. In such couples, one may be pursuing a “career” in the traditional sense, while the other is not. Blue collar jobs are not usually thought of as careers since as a group they lack a developmental character or progression through patterned job sequences.
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- ⁶ Gender equality is highly valued especially by women in modern western societies, and DCC partnerships tend to be characterized by greater gender equality (Abele 2009, Apostol and Helland, 1993, Behnke and Meuser, 2003). Gender roles are socially created and egalitarian conceptualizations emphasize that men and women should be free to choose roles they want to perform with no power gap between men and women’s roles. Working full time increases both partners autonomy, offers opportunities for recognition and contribution to society and shows acknowledgment and appreciation of each partners profession.
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- ¹⁹ Kaiser, S., Ringsstetter, M. (2011). *Creating balance? International perspectives on the work life integration of professionals*. Springer.
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- ²³ Abele et al, 2011.
- ²⁴ Bianchi, S., Sayer, L, Milkie, M. & robinson, J. Housework: Who did, does or will do it, and how much does it matter? *Social forces*, 91 (1): 55-63.
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- ²⁹ Judd, 2004.
- ³⁰ Broysberg et al, 2014.
- ³¹ Some professions or industries are easier for DCCs. Politics, media, and the entertainment industries are all famous for “power couples” whose careers complement each other. Academia, by contrast, is difficult for married couples because jobs are both scarce and geographically dispersed. All high-powered careers have heavy workloads, but industries and jobs differ greatly in terms of control of schedule, travel requirements, mobility requirements, scalability (able to ramp up or down) and availability of jobs. Source; Broysberg & Abrahams (2014).

ENDNOTES | EFL PLAY #1

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- ⁶ A 2016 randomized control trial demonstrated that IT workers at a Fortune 500 company who participated in a flexible work program reported higher levels of job satisfaction and reduced levels of burnout and psychological stress than employees at the same company who did not participate. Source: Moen, P., Kelly, E., Fan, W., Lee, S., Almeida, D., Kossek, E. & Buxton, O. (2016). Does a flexibility/support organizational initiative improve high-tech employees' well being? Evidence from the work, family, and health network. *American Sociological Review*, 81 (1): 136-164.
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- ¹⁰ IWG 2019 research shows that 75% of businesses are using the offer of flexible work to attract younger workers. Source: (2019). The IWG global workplace survey 2019. International Workplace Group. Retrieved from <http://assets.regus.com/pdfs/iwg-workplace-survey/iwg-workplace-survey-2019.pdf>.
- ¹¹ Flexibility issues are considerably more important to parents than non-parents as a factor in quitting. Factors in quitting include lack of workplace flexibility including no option to telecommute (70% of parents vs. 59% of non-parents), a "flexibility stigma" in the workplace (72% vs. 62%) and a boss that doesn't allow you to work flexibly (72% vs. 65%). Source: (2015). *Global generations: A global study on work-life challenges across generations*. EY. Retrieved from [https://www.ey.com/Publication/vwLUAssets/Global_generations_study/\\$FILE/EY-global-generations-a-global-study-on-work-life-challenges-across-generations.pdf](https://www.ey.com/Publication/vwLUAssets/Global_generations_study/$FILE/EY-global-generations-a-global-study-on-work-life-challenges-across-generations.pdf).
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- ⁶ Desilver, D. (2017). *Access to paid family leave varies widely across employers, industries*. Pew Research Center.
- ⁷ The construction industry and accommodation / food services industry are the lowest at 5%, and retail is also low at 7% (these industries also tend to have workforces that are part-time and paid hourly).
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- ⁹ The construction industry and accommodation / food services industry are the lowest at 5%, and retail is also low at 7% (these industries also tend to have workforces that are part-time and paid hourly).
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- ¹⁵ Raub et al. (2018). *Paid parental leave: A detailed look at approaches across OECD countries*. World Policy Analysis Center.
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- ¹⁷ When fathers take leave, it equalizes the division of family labor and significantly increases fathers' involvement with their infants, including beyond the time of leave. Source: Hyde, J., Klein, M., Essex, M., Clark, R. (1995). *Maternity leave and women's mental health*. *Psychology of Women Q*, 19: 257-285.
- ¹⁸ If mothers take leave from their jobs and fathers don't, mothers tend to learn more about their children's needs and personalities, and develop their parenting skills. This reinforces a mistaken but commonly held belief that mothers are naturally better caregivers and leads to maternal domination of child care. Source: Malin, M. (1994) "Fathers and Parental Leave," *Chicago-Kent College of Law*.
- ¹⁹ For men, because women are considered the primary caretakers from a social and cultural perspective, it is not normative for men to be engage fully in family work and they can suffer greater career fallout than women in taking paternity leave. Source: Malin, M. (1994). *Fathers and parental leave*. Chicago-Kent College of Law.
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- ²⁴ *Family-friendly and Wellness SHRM Employee Benefits 2019* (2019). Society of Human Resource Management (SHRM) [PDF file].
- ²⁵ As of 2018, 2% of employers provided benefits allowing nursing mothers to ship breast milk home while on business travel (at company cost) (Retrieved from: <https://www.shrm.org/hr-today/trends-and-forecasting/research-and-surveys/Documents/2018%20Employee%20Benefits%20Report.pdf>).
- ²⁶ Organizations like Mamava work with companies to provide lactation "pods" that are fully equipped, easy to assemble, and easy to relocate as alternatives to fixed rooms. Secure access is provided through a free app that offers smart security, control over lighting and airflow, and can also capture usage data for users. These pods are already available in several airports and schools across the US, and are being adopted by a growing number of private businesses as well—Mamava currently has 900+ customers.
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- ³² *World population prospects*. United Nations. Retrieved from <https://population.un.org/wpp/Download/Standard/Population/>.
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- ³⁴ One study out of the Center for Women and Work found that women who took paid maternity leave were 93 percent more likely to be working nine to twelve months after giving birth than those who didn't take leave. Source: Houser, L. & Vartanian, T. (2012). *Pay matters: The positive economic impacts of paid family leave for families, businesses and the public*. Rutgers.
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- ³⁶ Companies have also shared impacts from increasing their maternity leave policies: Google increased leave from 12 weeks to 18, and in turn halved the rate at which new mothers quit. When Accenture doubled leave from eight weeks to 16, its turnover rate for new mothers fell by 40%. Source: Collings, D., Freaney, Y., van der Werff, L. (2018). *How companies can ensure maternity leave doesn't hurt women's careers*. HBR.
- ³⁷ Dishman, L. (2016). *The real cost of paid parental leave for business*. Fast Company.
- ³⁸ Zillman, C. (2016). *IKEA is giving U.S. employees paid parental leave no matter how many hours they work*. Fortune.
- ³⁹ (2016). *IKEA broadens US parental leave coverage*. Wall Street Journal.
- ⁴⁰ S. Skrypnik, personal communication, November 18, 2019.
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ENDNOTES | EFL PLAY #3

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- ² Dalberg, 2019
- ³ (2011). More than one in six American workers also act as caregivers. Gallup. Retrieved from <https://news.gallup.com/poll/148640/one-six-american-workers-act-caregivers.aspx>.
- ⁴ Porter, E. (2019). Why aren't more women working? They're caring for parents. New York Times. Retrieved from <https://www.nytimes.com/2019/08/29/business/economy/labor-family-care.html>.
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- ⁷ ODI, 2016, citing a range of studies that estimate the relationship between having a child and maternal employment (controlling for other factors) in developed and developing countries.
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- ⁹ Glynn, S. J. & Corley, D. (2016). The cost of work-family policy inaction. Center for American Progress. Retrieved from <https://cdn.americanprogress.org/wp-content/uploads/2016/09/22060013/CostOfWorkFamilyPolicyInaction-report.pdf>.
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- ¹² This includes financial assistance whereby the cost of care is fully or partially paid by a subsidy – potentially through partnering with local childcare and elder care providers. It may include vouchers or reduced rates and can be appropriate when quality care is available. This allows for flexibility of employees in selecting a care provider that meets their needs.
- ¹³ Another type of financial support workplaces can offer is dependent care flexible spending accounts (FSAs) that allow individuals to set aside money tax-free for family care-related needs (child and elder care).
- ¹⁴ Reserving spaces can be helpful when there is high or fluctuating demand.
- ¹⁵ Referrals can connect employees with quality care providers in their area. This could be in partnership with a local resource and referral agency.
- ¹⁶ Providing child-care at or near employees' workplaces can be convenient and attractive for new parents, and the hours can be adjusted based on the working schedule. For a more cost-effective option when parents are not in full-time employment and have some flexibility, companies provide a space for childcare and pay for some staff, while parents manage the center and provide some of the childcare themselves.
- ¹⁷ Companies can collectively contribute to investments and operating costs for a care center for employees of the different companies. Or companies can work together to collectively fund existing child and eldercare centers.
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- ¹⁹ School vacation care can include offering summer camps for employee children or additional paid leave aligning with summer vacations or holidays.
- ²⁰ Back up care services can support parents with alternative care options at short notice if care arrangements creak down at short notice.
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- ²² The employer usually covers the cost of the concierge while employees are responsible for the actual expenses for the service. If an employer chooses to reimburse or provide vouchers for the services themselves, they must determine whether the assistance would result in taxable income to employees and would need to be reported on their W-2 forms. Employers should consult a tax professional for more guidance on the tax treatment of concierge benefits.
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- ³ Reverse mentoring does not have a uniform definition.
- ⁴ Former CEO of General Electric (GE), Jack Welch, is credited with popularizing this idea in 1999. He paired 500+ top leaders with junior associates in the hopes that the younger employees would share knowledge and resources about technological advances and tools and help keep the company updated.
- ⁵ Different generations show differences in work values, personality, collective memories, and work behaviour, often categorized as age/cohort based identities. Millennials, for instance, place higher value on leisure, work-life balance, are tech savvy, globally concerned, comfortable with diversity, highly innovative and learn best through collaboration. reverse mentoring helps reduce assumptions and negative stereotypes. Retrieved from Murphy, W. M. (2012). Reverse mentoring at work: Fostering cross-generational learning and developing millennial leaders. *Human Resource Management*, 51(4), 549–573. doi: 10.1002/hrm.21489
- ⁶ The increased frequency and quality of interactions between high level managers and junior employees leads to a culture shift wherein individual people are valued instead of long standing “company culture”, which improves accuracy and reliability of subjective assessments. Not only does this challenge traditional business hierarchy, pushing management to listen instead of talk, but it provides junior employees with opportunities to demonstrate competence in content shared (tech, gen trends) and interpersonal/teaching skills, helping with succession planning.
- ⁷ T43% of millennials plan to leave their job in the next two years. Source: (2018) Deloitte Millennial Survey. Deloitte. Retrieved from <https://www2.deloitte.com/content/dam/Deloitte/global/Documents/About-Deloitte/gx-2018-millennial-survey-report.pdf>.
- ⁸ Pershing is a financial services company that recently implemented a reverse mentoring program. Following implementation of the company-wide initiative, Pershing experienced a 96% retention rate for the 77 millennials who were involved. Retrieved from https://www.huffpost.com/entry/mentoringup-millennials-reverse-mentor-at-pershing_b_59518180e4b0f078efd98420.
- ⁹ Millennials thrive in personalized opportunities to contribute to their workplace and have their opinions heard. This helps challenge and stimulate them in meaningful ways that expand their networks and build their careers. Programs like this can also uncover motivations and disincentives that should inform HR policies (especially regarding DCCs)
- ¹⁰ Informally, traditional mentors tend to select mentees like themselves; this structure encourages the overcoming of such unconscious biases, often resulting in improved social equity and diversity within the company. For instance, After Procter & Gamble’s reverse mentoring program paired senior leaders with employees with disabilities, it discovered its internal videos were inaccessible to those with hearing challenges and, accordingly, added captions to all. Source: (2013) Diversity and Inclusion Annual Report. P&G. Retrieved from https://www.pg.com/en_US/downloads/company/purpose_people/PG_DiversityInclusion_AR_2012.pdf.
- ¹¹ Once senior management is exposed to the worldviews and desires of younger target markets, innovation is enhanced through the creation of sounding boards where more experienced employees are not directly evaluating their junior mentors’ performance. Individual learning is thus transferred to the organizational level, foregoing hierarchical decision making in favour of a flat structure that brings in new, fresh ideas.
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- ¹³ Programs with more confident, engaged pairings are likely to exist in organizations where c-suite executives highlight the strengths of its give-and-take partnership, eliminating the “us versus them” mentality and signalling to other leaders that the role reversal is encouraged. Retrieved from <http://www.aarp.org/work/on-the-job/info-2015/on-the-jobmentoring.html>.

ENDNOTES | EFL PLAY #6

- ¹ The definition of Employee Resource Groups is not uniform. This document draws from the Catalyst definition, which is a broad explanation of its function and components
- ² Kaplan, M.M., Sabin, E., and Smaller-Swift, S. (2009), *The Catalyst Guide to Employee Resource Groups. Volume 1: Introduction to ERGS.*
- ³ Most effective ERGs are backed by senior-level executives who (1) share business acumen with members of the ERG in a bid to expand their business impact, and (2) act as liaisons between the ERG and senior-level company officials to help enact change on a larger scale. The 2018 Corporate Equality Index reported that 97 percent of LGBTQ ERGs are sponsored by an executive champion who connects the group to the upper management of the company. Furthermore, over half of these executive champions (60 %) identify as allies, and 38 percent report being openly LGBTQ.
- ⁴ Toolkit for Establishing and Maintaining Successful Employee Resource Groups. EARN, 2013. Retrieved from: http://www.askearn.org/wp-content/uploads/docs/erg_toolkit.pdf.
- ⁵ The most prevalent ERG focus areas reported by study participants are women (93%), race/ethnicity (90%) and LGBT (84%). Other ERG focus areas include disability (52%), generational (48%), multicultural (43%), working parents (35%), military service (34%), single religion (16%), adoptive parents (13%), elder-care responsibilities (11%) and interfaith (9%). Source: ERGs Come of Age: The Evolution of Employee Resource Groups. Mercer, 2011. Retrieved from: <https://docplayer.net/5069891-Ergs-come-of-age-the-evolution-of-employee-resource-groups.html>.
- ⁶ Welbourne, Rolf & Schlachter. The Case for Employee Resource Groups: A Review and Social Identity Theory-based Research Agenda, 2015. Retrieved from <https://ceo.usc.edu/files/2017/11/G16-10677.pdf>.
- ⁷ For instance, navigating a culturally ingrained notion of not speaking out of turn to combat a potential loss of promotion opportunities.
- ⁸ Retrieved from: <https://diversitycity.com/2017/02/20/the-dos-and-the-donts-a-simple-guide-for-employee-resource-groups-ergs-or-employee-inclusion-groups-eigs/>.
- ⁹ Deloitte's Radical Attempt to Reframe Diversity. HBR. Retrieved from: <https://hbr.org/2017/08/deloittes-radical-attempt-to-reframe-diversity>.
- ¹⁰ ERGs assist in recruiting efforts by ensuring that hiring managers are prepared and equipped to appeal to diverse audiences, forging ties to educational institutions and professional organizations to tap into niche applicant pools in order to increase representation at a grassroots level. In a survey of over 1500 employees in the US, 70% of those between the ages 18-24 and 52% of those between 25-34 said having ERGs would positively influence their decision to apply to a specific company. Source: SoftwareAdvice. Survey: Employee Resource Groups Help Engage Gen Y Workers. Retrieved from: <https://www.crescendostrategies.com/new-survey-shows-employee-resource-groups-%EF%BB%BFpositive-impact-on-millennial-workers/>.
- ¹¹ Not only do ERGs help cultivate a sense of belonging right from the onboarding of new employees, but the coaching, mentorship, and sponsorship opportunities they offer also help improve the rate of retention of diverse employees.
- ¹² Almost 78% of 18-24 year olds and nearly 84% of 25-34 year olds report that ERGs have a positive impact on engagement. 83% of millennials are more actively engaged when they believe their company fosters an inclusive culture. In turn, research continues to demonstrate the positive correlation between employee engagement and productivity. With turn-over costs calculated up to two times annual compensation, the benefits are especially compelling. Source: SoftwareAdvice. Survey: Employee Resource Groups Help Engage Gen Y Workers. Retrieved from: <https://www.crescendostrategies.com/new-survey-shows-employee-resource-groups-%EF%BB%BFpositive-impact-on-millennial-workers/>.
- ¹³ ERGs provide support to HR by creating communities for diverse employees and representing them at recruitment events, helping their company build a workforce that reflects the demographics of their customer base. According to a survey, 70% of companies utilizing their ERGs in this manner find that they can better connect to an increasingly more diverse market. 30% of the companies surveyed got assistance from their ERGs to increase their organization's spend with diverse suppliers. Source: Are Employee Resource Groups Good for Business? SHRM, August 2016. Retrieved from: <https://www.shrm.org/hr-today/news/hr-magazine/0916/pages/are-employee-resource-groups-good-for-business.aspx>.
- ¹⁴ Example: At Frito-Lay, the Hispanic/Latino ERG (Adelante) is credited for coming up with the hugely successful guacamole flavoured chip, which generated more than \$100 million in sales in the first year—market research and product development. Retrieved from https://www.diversitybestpractices.com/sites/diversitybestpractices.com/files/import/embedded/anchors/files/_attachments_articles/r-ergmulticulturalmarketing-june2013.pdf.
- ¹⁵ For example, during Pride events, Macy's Pride Network launches a full ad campaign (which entails branded t-shirts for all Macy's employees) as well as Pride kiosks that access its online Pride registry for wedding and commitment ceremonies. Retrieved from: Jennifer Brown Consulting. Cisco. Employee Resource Groups that Drive Business. 2010.
- ¹⁶ Job-protected leave to bond with a new-born baby, newly adopted or foster child, to be taken within 12 months of the child's arrival in the home. Source: California Work & Family Coalition. Six Key Laws for Parents [PDF file]. Retrieved from: http://paidfamilyleave.org/pdf/KeyLawPoster_ENG.pdf.
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- ¹ Permits Foundation (2012). International Mobility and Dual Career Survey of International Employers [PDF file]. Retrieved from: <https://www.permitsfoundation.com/wp-content/uploads/2013/06/Permits+Global+Survey+2012nw.pdf>.
- ² Refusal to move / transfer can result in 'career suicide', depending on the industry—unrestricted mobility is seen as especially essential in the banking and legal industries.
- ³ Commuter roles refer to assignments for which the employee works in a host country/city and travels back to their home country/city roughly once a week. Commuting employees can be split into two main types: (1) "multiple workplace commuter" who lives and works in one area but has regular workdays in one or more other locations—commuting is an integral part of their roles and might be an indefinite assignment, and (2) "personal commuter", who chooses to live in the host location without their family as an alternative to traditional long-term expatriate assignments and typically returns home every weekend. Source: ECA International (2018, March 23). Commuter assignments – the consequences beyond the financial cost. Retrieved from: <https://www.eca-international.com/insights/articles/march-2018/commuter-assignments-the-consequences>.
- ⁴ A 2008 survey of 3305 expatriate spouses/partners found that 68% of respondents who found work reported that their employment had a positive impact on the willingness of the couple to extend the assignment, and 56% of working respondents reported that it had a positive impact on the expatriate employee's willingness to relocate in the future. Source: Permits Foundation (2008). International Survey of Expatriate Spouses and Partners [PDF file]. Retrieved from: <https://www.permitsfoundation.com/wp-content/uploads/2013/04/Spousal-Survey-Full-RS.pdf>.
- ⁵ As a firm gains a reputation of being one that supports employees in DCCs, it sends a signal to members of the workforce who are in prioritize the kind of support the firm provides, making it easier to attract potential new employees who are in DCCs.
- ⁶ The 2008 survey of 3305 expatriate spouses/partners found that 74% of respondents who found work reported that their employment had a positive or very positive impact their family relationships, which are known to influence assignment success and return rates. In fact, 81% of working respondents reported that it had a positive impact on the expatriate employee's willingness to complete the assignment. Source: Permits Foundation (2008). International Survey of Expatriate Spouses and Partners [PDF file]. Retrieved from: <https://www.permitsfoundation.com/wp-content/uploads/2013/04/Spousal-Survey-Full-RS.pdf>.
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