Working Paper

Work Redesign: Theory, Practice, and Possibility

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Introduction

On February 13, 2002, Lotte Bailyn and Joyce Fletcher presented the first Workplace Center Seminar on "Work Redesign" from which this working paper is derived. Why focus on work redesign? While family-friendly benefits are important and many of us involved in the MIT Workplace Center have fought for these over the years, the MIT Workplace Center's mission is work redesign because systemic analysis and interventions that target the system as a whole are needed for real change in both work **and** family life.

Lotte Bailyn and Joyce K. Fletcher are coauthors with Rhona Rapoport and Bettye H. Pruitt of *Beyond Work-Family Balance: Advancing Gender Equity and Workplace Performance* (Jossey Bass, 2002). Their presentation follows.

Overall Conceptual Context and Approach

About ten years ago, a number of us started a project at the Xerox Corporation that was funded by the Ford Foundation. Our team consisted of Lotte Bailyn, Susan C. Eaton, Joyce K. Fletcher, Maureen Harvey, Robin Johnson, Deborah M. Kolb, Leslie Perlow, and Rhona Rapoport. We began with a concern for gender equity, for despite Equal Opportunity legislation and affirmative action programs, women were still not moving up in corporations. At the time we began this work, top companies had many family-friendly policies and Xerox was seen as very progressive. But they too were having problems retaining and promoting women. We felt that the wrong emphasis was in place. Family policies by themselves were not helping Xerox be an equitable workplace. A reframing, a rethinking was necessary. In particular, we felt that Xerox and other companies concerned with retaining and promoting women had to get away from an individual accommodative approach to help individuals with family responsibilities to manage their lives. Rather, there had to be a systemic reconsideration of the organizational norms, values, and structures that created an inequitable workplace in the first place.

Family policies themselves were not helping Xerox be an equitable workplace.

Breaking the Mold (Bailyn, 1993), an early statement of this alternative view, talks about learning from diversity. If you have different kinds of people coming into a workplace and they are not succeeding to the extent that you think they should, do not look only at them and see what you can do to help them. Look, rather, at the organizational practices that are making it difficult for these people to live up to their potential. Our belief was that if you do, everyone will benefit, not only the "different" people who brought up the issue. There is a good example of this from a long time ago at New England Telephone (see Case Example that follows).

Case Example: New England Telephone

At the time of the AT&T Consent Decree, New England Telephone had to get women into supervisory positions. New England Telephone had always taken their supervisors from their craft people and had a very elaborate supervisor training program. The men who went through this training worked extremely well as supervisors. But when New England Telephone trained the women in this way, they were not successful. At that time they had a very forward-looking manager who did not blame the women, but called in a sociologist to look at the problem. The sociologist discovered that the reason the men were doing so well had nothing to do with the wonderful training they were getting, but had to do with informal on-the-job help they received once they were supervisors. The women weren't getting this help. With that insight, the company saved a lot of money by not having to do this very expensive training any more. They could put into place what was really effective -- helping people on the job. Once men and women had the same on-the-job assistance, they both performed well.

This example shows that it is necessary to identify the norms, values, and routines that exist in the workplace. To make progress for women, we must examine and question the institutions of the workplace and the practices they reinforce. This approach led to a whole new way of thinking about gender equity. It meant looking at the relation between work and family not as two separate spheres, which has led to the underlying gendered division of labor in the industrial world, but to see them as integrated.

From this cultural myth of separate spheres comes the idea of an ideal worker as someone who has no other responsibilities and commitments except to employment. Rosabeth Kanter (1977) first identified the ideal worker and showed how organizations based their work practices and routines on this assumption. Since then, this argument has been elaborated further (see e.g., Bailyn, 1993; Fletcher, 1999; Harrington, 1999; Williams, 2000) and is explained in detail in a later section of this paper. What is needed is to go beyond these cultural myths of the ideal worker and separate spheres.

When we started our work, organizations were trying to help women, particularly women with children, accommodate to the masculine gendered notions of top performance. The family-friendly policies they introduced were certainly helpful and allowed women to have some

balance. But they did not advance their careers. Further, though the policies were formulated as gender neutral, they were not used by men, who were afraid to ask for them. And so these policies were neither helping women to rise in their companies nor supporting men who wished to participate in family life. It was clear one had to go beyond this policy approach to achieve gender equity.

The goal of this new approach was to uncover work patterns grounded in unquestioned rules, values, and norms, in established institutions that just reinforced the work practices that were detrimental to the ability of employees to integrate their employment with their personal responsibilities. The question before us was whether it was possible to change these work structures to benefit employees without hurting the work. Our presumption and hope were that if we really looked at work design through a gender or a work-personal life lens, we would be able to identify institutional patterns that were previously not questioned but that could be changed to benefit both the employee and the effectiveness of the organization. Having reached this bold hypothesis, we realized that the only way to test it would be actually to try it. That is what led us to the action research mode.

Our approach was to use peoples' difficulties in integrating their work and their personal lives as a catalyst for organizational change, for change in the way that work is accomplished. In many of the organizations where we tried to do this, we have actually been successful (see Rapoport, et al., 2002). Change has come about by challenging the current institutional context and bringing gender and family issues explicitly into the workplace and connecting them directly to work goals. Doing this leads to reflection on and a challenge to existing practices and assumptions. In that challenge and in that reflection reside the possibility of change.

Case Example: Bringing Employee Issues and Business Issues Together

A small business underwriting group had just gone through a reengineering and a move resulting in longer commutes for employees. The group had lost staff as a result of this reengineering, in particular a number of administrative staff. The employees were not only faced with longer commutes, but also stress and long hours, partly because they no longer had enough administrative support to help them with some of their clerical work. The business was also having some trouble. This particular unit was not meeting its goals, neither in terms of numbers of loans processed nor in the quality of the loans it processed. The poor quality brought up the question of the judgment of the underwriters. What brought the employee and business issues together, at least on the symptom level, was the problem of sleeplessness. The employees complained that they were having many sleepless nights: they were not meeting their numbers and felt overwhelmed. It was affecting their family life. When the managers heard about the sleeplessness they immediately saw a connection because they knew that if one is not sleeping well, one's judgments are not going to be sound. And bad decisions on loans have a direct impact on the bottom line.

Once that connection was made, it was possible to rethink ongoing practices and to rethink assumptions, even the assumptions that underlay their reengineering effort, which had to do primarily with cost cutting. And so, on a trial basis, against the whole philosophy of the reengineering effort, they hired temporary help and taught the remaining administrative assistant to write acceptance and rejection letters. Freed from this task, the underwriters could spend more time on their work of underwriting. The result was that the unit performed better -- so much better that the company made the temporary help permanent. The underwriters had fewer sleepless nights, and with better judgment, made better quality loans. And once the company was open to the possibility of change, they could rethink other existing structures and relationships – in particular, they changed the relation between underwriters and field reps which eased a number of existing bottlenecks.

The changes in the example above, as in many of the examples in our book (Rapoport, et al., 2002), may sound simple and obvious. So why had no one thought of them before? Why had this organization not anticipated the possible negative consequences of the reengineering?

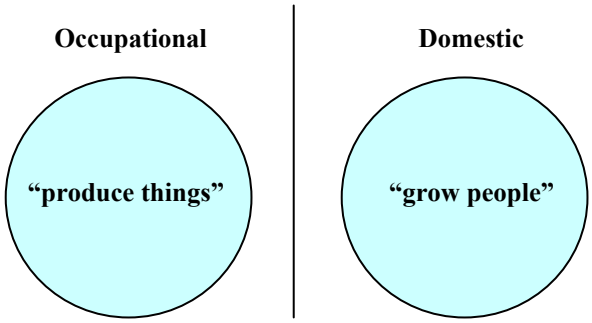
The reason is, and we find this over and over again, that these kinds of changes do not occur to people if they do not explicitly include employees' *personal* needs when thinking about work redesign. By considering the unit only as a *business* unit, this firm turned to reengineering which, in part, created these problems for them and their employees. Only making explicit connection between employees' personal lives, the work they do, and the institutions that surround that work, can one identify the assumptions that hold in place practices that are not good either for the effectiveness of the work or for employees' lives. And only then can one hope to introduce change that will help both the work and employees' lives and thus approach the goal of a more equitable workplace.

Why This Works

Most work practices are based on the image of workers who have no outside responsibilities and therefore can devote full time and attention to the job. The "learning from diversity" lens we took in this project was to use people who *do* have outside responsibilities, such as family and community responsibilities, to challenge these work practices and make changes that would benefit both work and personal life. What we want to explore in this section is, why does this work? Why is it possible to make changes in work practices that help people better integrate work and personal life and have these changes also benefit the quality of the work? To answer this question we need to explore one of the basic assumptions on which our Western society is based, the assumption of what sociologists call "separate spheres." This refers to the fact that as a society, we tend to see the world as divided into two domains, the occupational domain of paid work where we "produce things" and the domestic domain of family and community where we "grow people."

Figure One

Separate Spheres



This way of seeing the world seems so natural that we rarely think of it or question its influence. But if we do look more closely, there are a number of things about this image that are important because they can help us see some things about the challenges in changing work cultures to be more family friendly that we might not otherwise see.

Spheres are separate: First, conventional wisdom holds that these spheres of life are separate and at odds with each other. That is, it is assumed that the spheres are fundamentally different and that what it takes to be effective in one is different, or even the opposite of what it takes to be good in the other.

Ideal worker: The assumption of separation has given rise to the notion of what is often called the "ideal worker." The ideal worker in each sphere is someone who has no heavy responsibility in the other sphere. That is, an ideal worker in the occupational realm is someone for whom work is primary and who either has no real responsibilities in the domestic sphere or has someone else who handles those responsibilities. And the same is true for the domestic realm. We assume that the best caregiver – the one who would get the best outcomes – would be a person who could focus exclusively on that task and not have responsibilities in the paid sphere.

Ideal work: This separation has another powerful but less obvious effect. That is, each sphere has its own definition and set of beliefs about what it means to be effective. Thus, we have a body of knowledge about how to produce things and a body of knowledge or wisdom about how to grow people that are separate and distinct. Because the two spheres are assumed to be not only separate but at odds, these bodies of knowledge rarely inform each other. In fact, we tend to

think that skills in one almost *disqualify* you from being good at the other - so if you are a caring sensitive person we might assume that you will have a hard time succeeding in the workplace and if you are a hard driving bottom line thinker that you might not be the best at parenting.

Spheres are sex-linked: One of the most obvious characteristics of the spheres is that they are gendered. That is, in our mind's eye, we tend to associate men with producing things and women with growing people. But it is not just the "ideal workers" who are gendered, the notion of ideal work itself is also gendered. That is, doing good work in the occupational realm – producing things – is associated with traditionally masculine characteristics. Both men and women can display these characteristics but the characteristics themselves – things such as linear thinking, rationality, assertiveness, and competitiveness – are typically thought of as masculine. And of course the opposite is also true. Doing good work in the domestic sphere – that is, being effective at growing people – is associated with traditionally feminine characteristics such as empathy, listening, and sensitivity. Again, both men and women could display these characteristics but the characteristics themselves are traditionally thought of as feminine.

As an aside, it is important to note that although the notion of separate spheres is a powerful mental model, in practice the separation is more myth than reality. Everyone has a personal life and whether we acknowledge it or not, it has an effect on our work. Not only are the spheres not so separate, increasingly they are not so sex-linked. While the assumption that all good men work and all good women stay home has never been true except for a very narrow slice of the population, now it is even less true. Increasingly, men are active participants in family life and women are active – and powerful – players in the work sphere. Nonetheless, the belief in separate spheres gives rise to some powerful images that influence our mental models of how the world works. First, it helps us see that we hold an image of an ideal worker in each sphere who has a certain life situation and a certain set of skills that are gendered. Second, there is a body of knowledge in each sphere – a set of principles about how to do good work – that is also linked in our minds to gender. Because of the assumed separation of these spheres, the body of knowledge is bounded and constrained. It is closed to wisdom from the other sphere because association with that sphere taints it – and the people who do it – as somehow inappropriate.

The reason equity and effectiveness are linked has to do with some of the less visible consequences of this separate spheres thinking and the images it evokes. In terms of equity, it is

easy to see that conflating idealized masculinity with doing work is going to create equity issues for women. Not only might they have more difficulty in pretending they do not have a personal life or family responsibilities but they would also have more difficulty displaying stereotypically masculine characteristics without negative consequences.[1]

The effectiveness issue has to do with how conflating idealized masculinity with the doing of work is problematic for the work itself. In today's knowledge intensive world where the importance of teamwork and collaboration is increasing, wisdom about people is critical to business success. Work practices that are constrained by gendered images of competence may not be accessing this wisdom and may, in fact, be undermining an organization's ability to meet its goals. Thus, it is easy to see that relaxing the separation and integrating the two spheres of knowledge would have potential benefits for the work itself. And this is the basic premise of our book, *Beyond Work-Family Balance* (Rapoport, et al., 2002): It is possible to challenge conventional wisdom about ideal workers (equity) AND ideal work (effectiveness) and make changes that can benefit both.

What this theoretical frame helps us see is that the reason equity and effectiveness are linked is that there are a number of dysfunctional work practices in organizations that are rooted in separate spheres thinking. While many of these work practices seem as if they are driven by the needs of the work, we have found that when we use a "separate spheres" frame to understand them we see that they are often held in place because they serve another, even more powerful purpose. They give people an opportunity to demonstrate some aspect of ideal work in the occupational sphere: either an ideal worker for whom time at work is no object or ideal work that entails displaying stereotypical masculine attributes. For example, many work practices with equity and effectiveness implications have to do with how time is used as a measure of commitment (see Case Example on next page).

[1] As an aside it is interesting to note that of course the opposite equity issue would be true of men in the domestic sphere. Although this is not something we focus on much, it is the flip side of the work-personal life issue at work and something that would be interesting to explore further.

Case Example: Time to Demonstrate Commitment

A marketing department in a high tech company on the west coast is a classic example of this time equals commitment work practice. The department was always working under crises and not planning ahead. The group responsible for client presentations was continually pulling all-nighters in order to get ready for client meetings. When the other workers would arrive the next morning, people would applaud the extraordinary effort of those who had worked all night. The managers would give them kudos as well, holding them up as examples of dedication and "doing whatever it takes". Of course there were costs to peoples' work-personal lives in having to pull all-nighters. But in a funny way, it was the fact that it ***was*** a cost to their personal lives that really showed they were committed. It was the fact that they were dead tired but still didn't go home, the fact that they were so obviously putting work ahead of all other responsibilities that demonstrated their commitment to the work.

What was hidden was the cost to the work. The people who pulled all-nighters were able to make it just fine to the client presentation the next day. Maybe they were even able to go out for lunch to celebrate afterwards. But then, they went home to rest and often did not show up the next day. As a result, other people on the team had to put a lot of their projects on hold, waiting for people to get back to work and up to speed. The effectiveness implications and costs of this work norm, although obvious in retrospect, were rarely noted or discussed and the practice itself was not questioned. At some level it seemed like this was just the nature of the job and the price one had to pay for being in this line of work. There was little incentive within the system itself to change it. Pressures of deadlines, the attention one got when meeting the expectation and the desire not to be seen as someone who was unwilling to "do whatever it takes" all combined to make it very unlikely that anyone would voice concern about the norm or suggest that it was difficult.

Our approach has been to identify work practices such as these, make them and their costs and consequences visible and discussible, and then help organizations make changes that will benefit both the people who are doing the work and the work itself.

But it is not only time that is the issue. Work norms and ideals about how to demonstrate competence also have implications for equity and effectiveness. In this case the influence of separate spheres thinking shows up in how certain attributes that are valued in one sphere are devalued in the other. One example is in what types of activities are considered "real" work. We found that in many occupational settings idealized or stereotypically feminine values and attributes are devalued. This often shows up in a very narrow definition of what it means to do good work. For example, in a financial services company, we found that the more masculine behaviors one had to exhibit to get the job were quite different from the more feminine behaviors it took to do the job well. In this group, when we asked people about what one needed to do to get promoted, they would talk about quantitative skills and an actuarial background. However, when we probed further, we found that doing this job well required additional relational skills like listening. One of the women who talked to us about it said,

> "You know, it's really important that you get good timely data and that's how you can do your financial reporting. And if you don't get the data from someone else, you can't get your reports in on time. Doing it requires things like making calls to the people you need numbers from and saying, you know, 'What's going on? What can I do to help?'"

Sometimes she said, she would go down and get lunch for people – or do something else to help – so they could continue to crunch numbers. In other words, she and others who were effective used a number of relational skills in their work such as listening, empathy, and a willingness to help. While these skills were really important to the work, they tended to be invisible in terms of rewards or promotions. Even when their importance was noted – and many people talked about them – they were seen as just personal attributes rather than skilled behavior: "That person is 'nice' or 'thoughtful'." So the requirements of the job remained narrowly defined in a way that over-valued the technical aspects and undervalued the relational. Clearly there were both equity and effectiveness implications of this very strong belief in what attributes are valued and which are not. For example, people who had relational skills were not seen as particularly well suited for the job or as deserving of promotion as someone who had more advanced but possibly even irrelevant technical experience or degrees. In fact if you were

someone who had relational skills you yourself might not want to call attention to how you used them because it might not be seen as doing "real" work.

Now who are the people who have relational skills? Often they are people who have practice and experience in the domestic sphere of home and community. That is, they know how to "grow people". They have either been caring for people in their community or caring for people at home and they have developed interacting skills -- skills like empathy and listening. But when they bring these skills into the workplace, they may not get credit for them. The equity implication is related to work and personal life because it means that people who have valuable skills they have learned in the domestic sphere may not be rewarded for using these skills at work and may even lose out on promotions and the like even if they are better at doing the job. And of course there are effectiveness implications as well. Not only might you not be promoting the right people if you have a workplace that requires people to sacrifice personal life for the job, you also may be denying yourself a valuable training ground.

These are the kinds of work practices that are good leverage points for change because changing them will not only help the equity concerns it will help the quality and effectiveness of the work itself. What is important to note is that the work practices we look for are not just those related to time but those that have broader implications and are related to what is valued in the workplace. What the theoretical frame of "separate spheres" allows us to do is make a new business case for gender equity work redesign. The old business case for redesigning work by looking through a work-personal life or a gender lens is that if work practices are *not* changed, then recruitment and retention for a significant part of your population will suffer. *The costs of not making change are recruitment and retention costs.*

It's not just around time and life situation, but these broader assumptions about what's valued in the workplace that are leverage points for change.

The new business case is premised on an understanding of how separate spheres undermines work effectiveness. It is bad for business not only because a significant part of your population does not have a traditionally masculine life situation but also because your work practices would benefit from wisdom, values, and skills that have been traditionally associated with femininity and the domestic sphere of life. In other words, integrating spheres could open up new, more effective ways of doing things at work. *The costs of not making change are quality and work effectiveness costs.*

Integrating rather than separating the spheres would mean changing norms about how work is done: what is real work, what is valued work, and what are the skills and behaviors needed to do it well. Getting to these types of work practices is not straightforward. We are asking people to examine work practices that are rooted in societal norms about the sex-linked separation of spheres. These work practices appear natural and normal and gender neutral but in fact are linked to gender identity and deeply embedded beliefs and assumptions about how the world works . Surfacing these kinds of assumptions requires that we engage a different type of organizational change methodology, one that will give people time and space to think about the mental models underlying their business practice, to experience how it feels to question these assumptions and imagine what work could look like if these assumptions were dislodged. The method we used in our projects has evolved and we have learned a lot about not only what works but why we think it works. *Beyond Work-Family Balance* (Rapoport, et al., 2002), is our attempt to capture our learning about the method, which we call CIAR.

Our Method

So what is CIAR? It stands for **C**ollaborative **I**nteractive **A**ction **R**esearch. Its overall goals are:

- To make these unexpected connections across the spheres
- To uncover the gendered assumptions that are holding the work institutions in place
- To allow a reframing that will permit alternatives to emerge.

Making those connections and uncovering the assumptions comes through **C**ollaborative **I**nteraction. Allowing a reframing is the beginning of the **A**ction part, which is very context-specific. For any intervention to be successful, it is necessary to be specific, to understand clearly how that particular workplace gets its work done – to understand the structure of work and the institutional context that creates and gets recreated by the on-going work practices. The **R**esearch part of CIAR comes in the analysis of the collected data - the understanding of how these processes work at that particular site.

The sources of data we use are multifaceted. We have used surveys both before we start our work and during it. A survey before going into a site is useful to convince management that these are important issues and are issues for men as well as women. These early surveys are not as helpful for diagnostic purposes. More useful for analysis are surveys after we already know a

fair amount about a site and can really design an instrument that deals with the practices that have emerged from this previous knowledge. But our primary data come from one-on-one interviews in which we talk about the work that people do, the culture behind it, and their personal situation. We try very hard to get people to see the connections among these elements by asking questions like, "What is it about your work that makes your life difficult?" During these interviews we are not just passive receptors, but engage what we have come to call micro-interventions. We push back on people. For example, if you are talking to a male manager who is telling you how his career has evolved you may, instead of just asking more questions about his career, say, "I'd be curious to know, do you think your career could have evolved in this way if you had a wife who had a full career?" And that opens up a whole new area. Or, for example, if you are hearing from a manager that he is very understanding when his women managers have to leave at 5:30 in the middle of a meeting and that it certainly would not affect how he thinks about them, you might say to him that that is discrimination: that the only answer to people having to leave the meeting is not to be understanding, but to stop the meeting. With these micro-interventions we try to get people to reflect on these connections and their consequences, both for the equity issues of what it is doing to their employees, and also for the effectiveness of the work.

We have also used group sessions, what we call roundtables because they are not like the standard focus groups held at the beginning of a project. Our roundtables take place after we already know much about the site and have done some analysis of our data. These roundtables start by feeding back the themes that we think are important for that particular workplace. They serve as a way to begin to get shared understanding. Because of the separation of spheres and because of the usual cultures in these organizations, everyone thinks these issues are their own individual problems. In these roundtables people realize that they are shared problems. And they also begin to hear that there are systemic issues involved, not only individual, and that leads to a collective understanding and a beginning point for subsequent intervention.

We discovered that the research team can really be a research instrument.

We also do observations, shadowing, following people around and asking them questions. For example, in one site, Perlow (1997) had people carry timers and made them write down what they were doing whenever they beeped which she could then follow up with

questions to understand what was behind their actions. At another site, Fletcher (1999) shadowed engineers all day and then interviewed them the next day in detail about what they had done and why.

A final important source of data is self-reflection on the part our team. We discovered that the research team itself can act as a research instrument. We found ourselves on occasion taking over the norms of the organization and by reflecting on that we found we could learn more about what the people on site were going through.

So our method is not an emergent ethnography where we just let the data emerge. We definitely have a goal in mind -- the goal to identify practices that have a double negative effect: on peoples' lives as well as on the effectiveness of the business. We try to collect data on the basis of which we can then analyze what the belief system is that leads to these dysfunctional practices in order to open up the possibility of change.

The processes underlying our method are mutual inquiry, fluid expertise, honoring resistance, and keeping the dual agenda on the table. Every step in the method is based on *mutual inquiry*. Though we come to the field guided by a goal, we do not come with pre-determined solutions. Our interaction, rather is based on *fluid expertise***.** This recognizes the fact that organizational members have the expertise about the everyday workings of their work and what is really going on in the organization, and we bring expertise on the importance of making these unexpected connections and how that has worked in other organizations. There are many occasions when we have to be completely dependent on the expertise of the organization. There are others when we have to be the experts.

Another element of our process concerns the way we deal with the inevitable resistance to any kind of change. Our goal is to *honor this resistance*. For example, we often found immediate resistance to even trying to make the connection between the design of work and people's personal lives explicit. But we do not see this as something that one needs to overcome. Rather, we consider this important data which needs to be dealt with. Finally, as will be detailed in a later section, it is very easy to get deflected from keeping these connections -- in one or the other direction, either in the direction of employees' well being or work effectiveness -- but they have to stay connected. *Keeping the dual agenda on the table* is a key job of the research team.

The research team is also dominant in the analysis of the collected data. The analysis consists of taking all the interviews, the field notes, the reports of the roundtables, our own

thoughts, our reflections on ourselves, and what we think we have seen, and then ask ourselves on the basis of these data, questions like the following:

- What does the "ideal worker" look like in this setting?
- What is recognized as competence in this work place?
- What work is seen as real work?
- How is time used in this work place?
- How is commitment gauged?
- What is the differential impact on men and women?

The answers to these questions allow us to identify assumptions underlying the work practices that impede gender equity and work-personal life integration. Once these assumptions are identified, we ask, "How are they affecting effectiveness? What is the relationship?" And so we try to identify what we call dual agenda assumptions that have a negative effect on both of these spheres and the work practices that flow from them. The analysis then proceeds through a number of steps. The first is to figure out why these practices exist, a type of functional analysis. There usually is a historical answer, but since times change what once was functional may no longer be so. Often, in fact, these practices are seen as problematic by the organization, for example command and control management, but people within the organization have not been able to change them, so we ask: what is keeping them in place? Finally, the analysis concludes with an outline of the unintended negative consequences for equity and work-personal life integration on the one hand, and for work effectiveness on the other. Feedback of the analysis to the organization starts the dialogue that one hopes will lead to successful change.

An example of the process of identifying one such assumption and how it played itself out follows.

Case Example: Identifying Assumptions

We worked with a nonprofit research and development organization, an NGO that provides grants to the developing world. We used all the techniques of data collection described above, including a context-based survey following initial acquaintance with the site. In analyzing the data we asked ourselves questions like: What work gets rewarded in this place? What is considered the real work? What people are seen as the most competent? We found a series of underlying assumptions that constrained work-personal life integration and impeded gender equity without seeming to be necessary for effectiveness. One of these we labeled, "Competence is new ideas." The activities associated with this assumption included the following: new ideas and new projects always took priority; there was much travel to the field in order to introduce new ideas and to work closely with grantees; knowledge generation skills were the most prized. All of this fit the mission of the organization, which saw itself as being very innovative and talked about "hands-on grant making." But there also were unintended consequences. Travel was hard for anybody with caring responsibilities and that included mainly women. Certain critical skills like synthesizing, supporting, following through, were undervalued because they did not produce new ideas. And often these very tasks were done by women, which meant they were not as likely to be promoted to professional status. So there were negative consequences for work-personal life integration and gender equity. And when we looked further, there were also negative consequences for work effectiveness. The frequent travel that was supported by this assumption subtly undermined the learning of the grantees by having program officers there so much of the time. Also, the lack of synthesis and reflection on on-going projects impeded the organization's learning from what it was doing. The work practices that stemmed from this assumptions also increased workloads since the organization was always adding things and nothing was ever dropped, which obviously made the work-personal life situation even worse. Once these connections were made, it was possible to rethink some of these practices. For example, the NGO evolved a team organization that included people with these "secondary skills." And they rethought the need for continuous travel. All of this led to better models of learning and knowledge management, both in the home office and in relation to their grantees in the field.

Such action steps are always devised in a collaborative manner, since outsiders lack the knowledge necessary to tell people what they should do or how they should gauge success. Work redesign needs the expertise of people who know what is really going on in that situation. Collaboration is also important in identifying evaluation criteria that reflect both sides of the dual agenda. How are the changes affecting employees' personal lives? How are they affecting the work? As has already been suggested, a key task, and a difficult one, is continuously to attend to both the equity and the effectiveness side of this work.

Making Change: Keeping the Dual Agenda on the Table

When we present our analysis of their work culture people usually get quite excited about the possibility for change. Our feedback always includes a description of the mental models we believe underlie some of their business practices – like the belief that "new ideas" is the most important form of competence – and our analysis of the intended and unintended consequences of these practices for both equity and effectiveness. Discussions at these feedback sessions are usually quite energized. After we present our story and have a general discussion, we break people into small groups to talk about possible work practice changes. Invariably these brainstorming sessions yield a number of great ideas sometimes filling reams of newsprint. Once the ideas are up for all to see we engage the group in a process of choosing one or two to implement, designing the process, and identifying outcomes on both sides of the Dual Agenda they want to evaluate. Then the process of implementation begins. And that is when things get interesting.

What we have found is that once a group starts to move toward implementation much of the original energy begins to dissipate as they discover how deeply embedded these practices are and how many things are holding them in place. It is at this point that we really need to be present in the process to help people work through the issues as they arise. One of the interesting things we have noted is that during implementation when things get difficult the two halves of the Dual Agenda tend to get separated. People choose one side to focus on – either the equity piece or the work effectiveness piece – and whichever one they drop tends to undermine, in some way, the whole effort. What we have learned is that it is difficult to keep them together, no matter how well we plan and how many times we talk about the fact that both sets of outcomes need to be achieved for the project to be successful.

We thought in the beginning that the side of the Dual Agenda we needed to be really vigilant about was the gender equity piece. We believed that managers in particular, once they were convinced of the effectiveness side of the issue would be supportive of making the change. But we feared that once the change was made – less travel for example in the Case Example above – old norms might reassert themselves and none of the benefits of this change would go back to the people, their workloads would just be increased, for example. So we were vigilant about keeping the equity piece on the table. But what we found was that we needed to be vigilant about the effectiveness piece as well.

Case Example – Keeping Effectiveness on the Table

One example comes from a manufacturing site where people were really gung-ho about the project. They came up with a work change initiative, a pilot they called "Coordinated Work Schedules." The goal was to give them more flexibility in their scheduling so they could take advantage of natural peaks and valleys in the work flow. This was a high powered group. They called themselves the "Green Berets" of this large organization because they were there any time, any place: they would do whatever it took to get the job done. The group designed a sophisticated and very detailed pilot program. The plan was that when people could foresee that there were going to be long nights where they would work well into the late hours, they would have the flexibility to say, "Well, in the days before, I'll take these two hours and make sure that I can get my washer fixed or go to my kids' soccer games or whatever." They put the pilot in place, complete with a huge whiteboard in the middle of the office to track schedules. They had all the success criteria identified as to how this was going to help them both in terms of their personal lives and also in terms of the quality of the work. But what happened was the goal of being what they called "family-friendly" took over and they lost the focus on the work. This was supposed to be something that was work-driven and took the needs of the work as primary. But in fact, during implementation the focus on the work started to disappear and pretty soon peoples' compensatory time took on the same importance as vacation time. So when people had an emergency at work, they did not feel they could go and say to someone, "I know you were supposed to be gone this afternoon, but something has come up." Because they were not able to problem-solve the situation, resentments started to build. This is the point where midcourse corrections in a project's design are called for – in this case they needed a way to deal with these conflicts that would preserve both halves of the Dual Agenda outcomes they had identified. Although we had agreed that we would evaluate the project as it was implemented in order to make these kinds of corrections, the group resisted our coming back. Attempts to collect evaluative data were stymied. As a result, the pilot worked well for a while but eventually these types of conflicts undermined the effort. After the fact, when we talked to people about why they had not wanted to evaluate the project and make changes as needed, they admitted that they were afraid that maybe the positive effects on the work would not show up in these evaluative criteria. They were enjoying the personal life benefits of the experiment so much and it was making such a difference in their lives that they didn't want to find out about any costs to the work. Thus they lost the opportunity to redesign the project creatively to handle the problems and eventually the whole project was dropped.

What we understand from this example is that the "I" in CIAR – the iterative, interactive nature of this work – is key. The project was designed well. In fact it even included an awareness that conflicts like this would arise and would have to be worked out. But only in the process itself can issues like this be revisited and reworked. What was needed as a midcourse correction was a discussion where people's fears and concerns could be addressed in a creative way, without losing either side of the Dual Agenda outcomes they had envisioned. As outsiders we could have given voice to these issues. We could have voiced concerns about the work as well as fears about losing the personal life benefits and brought people back to the design stage: "There are work concerns. There are personal life concerns. Let's incorporate these concerns now that we have experienced what it feels like. Let's tweak the design."

We believe that at this point in a project the group really does need someone outside itself to engage this process. But all of this takes much time and energy. Those of us who have worked on these action research projects have begun to feel like we would need to be tied to these organizations for life in order to make it work. In fact, some of us have not taken on new projects because of worry that we would have to stay with the organization for too long and we cannot make that commitment. Our challenge is how to have this complicated understanding of what's going on, give people this rich analysis, and yet not have collaborative interactive action research take so much time to get to the point where it is fruitful.

Questions and Answers

Q: I have no argument with the conclusion that there are all these assumptions in the workplace that result in practices dysfunctional to the work itself. My question is: If you're in the workplace immersed in the personal story of people's conditions, how would you deal with much wider systemic problems such as the notion of the endless availability of workers online or on a cell phone? This is something that is dysfunctional in many ways, but very functional in others.

Joyce Fletcher: One thing is to give voice to that. We are honest in doing our analysis, including the benefits of the assumption and the role it is playing and even why it exists. But we also include the costs and the dysfunctions. Then we ask the question, "What do you want to do about it? You brought us in to help you reflect on this and if you want to keep this work practice in place, fine. But realize that these are the costs."

Lotte Bailyn: This accessibility issue comes up a lot. What is not recognized is that there are costs to having people always accessible. Mainly it is that there's never any preplanning. We have examples of when all of a sudden people are no longer accessible all the time, the work practices actually get much more effective because people have to plan. They have to think about priorities and think ahead. We try to get people to see how norms of accessibility may lead to a lack of planning that then creates a culture of continuous crises because there's no incentive to try to prevent the need to have everyone accessible all the time.

Q: I'm trying to respond to your problem that this work is just too labor intensive. What I'm wondering is if you can try to train more people who are in the workplace to do these interventions. An alternative is that it sounds to me like you're beginning to see patterns that are recurrent. It's like there's four or five major diseases that reoccur— and maybe there's a way to begin to shift the focus toward these chronic diseases to say, "If we can just identify these things, here's what to look for and here are some ways that organizations have coped successfully with them." Maybe there's a way to make the change process more efficient and put people together and help those who have seen the disease rather than to have to do the diagnosis from ground zero, every time, over and over.

Joyce Fletcher: I think what you're saying is very important. We are now, as we reflect on it, beginning to see that these things cluster and that there's a way of a talking about them that could make our effort less intense because we already recognize some of these things. But the sticky

point for us is that we've tried to really short change it by saying, "You know what? Another work group had something very similar and this was their solution." Leslie Perlow's work is a perfect example of this. Quiet time is so appealing. You describe quiet time to people and their response is, "Oh, boy. I could really use that. I love that." But if you just try to implement "quiet time" it doesn't work because the people involved haven't gone through the process of understanding the role that constant interruptions play in their work culture and how it gets reinforced. And they didn't create the intervention themselves so it doesn't reflect their unique situation. So, we have found it is a problem to short change the process and yet I think we are not ready to say that there isn't something here. It is just that I am not sure we know how to go from these categories and what we know to short changing the process.

Lotte Bailyn: In a way, the book was an attempt to short change. The categories – or as you say the diseases – are in here. They are available for people who want to start this in their own organizations and time will tell if this can work. And I should add that we have found that things that were implemented, which we thought would not work, when we come back a year later or two we find that they somehow have taken hold. So there is a dynamic that can be tapped

Q: Will your approach work with hourly people who are not professionals?

Lotte Bailyn: Of course. We've done a lot with the technical and professional level, but we have also worked with clerical people. There the issues are inflexibility and rigid hours. It's the assumption that that kind of work has to be done on this absolute 9:00 to 5:00 basis and "you can't be late"-- it's a different ideal worker under those conditions. It's someone who's always there, never late, never absent. But there are possibilities of change there as well, more flexibility which helps employees and the work.

Q: Do you always need to work from the top down or can you do this bottom up?

Lotte Bailyn: Well, I think in some ways you're best off if you can work from both ends. Clearly there are structural issues that usually need the engagement of the top. But there also are ways in which people can come to be a source of energy to change those structures. So we think that if you can work at both levels at the same time in some ways it would be the best.

Joyce Fletcher: Yes. And here is where the notion of fluid expertise comes in. One of the ways we see our job when we go in, is if we can get top management listening to what people at the lower level are saying about how the work could be improved. When we go with work-family, that's what everybody, especially at lower levels, expects us to do-- challenge those

people at the top. You know, "Tell them they're doing this wrong and that they're not family friendly or whatever." But in fact, it's more fluid than that because the people "at the bottom" need to listen to what some of the top level concerns are and have that information fold into whatever the intervention is. And so this collaborative interactive action research is a model of getting more mutuality and more dialogue across levels in an organization. Though frankly, trying to establish these kinds of norms of mutuality is where we've had the biggest problem. It's not a model that people expect. It requires going back and forth and when people experience that they start to look at us as if we don't know what we're doing.

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