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# **Beyond Work-Family Balance**



**ADVANCING GENDER EQUITY  
AND WORKPLACE PERFORMANCE**

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*Advancing Gender Equity  
and Workplace Performance*

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## *To the four Bs*

# Preface

In 1990, June Zeitlin, a program officer of the Ford Foundation, launched a project that would take a different approach to the issue she had been calling work-family balance. Together with Rhona Rapoport, a longtime consultant to the Foundation on gender and work-family issues, she conceived a new initiative: a research partnership with for-profit corporations. For much of that year, Zeitlin and Rapoport made the rounds of corporate executive offices trying to identify a few large U.S. companies willing to participate. The organizations they approached were on the leading, progressive edge of work-family policy and offered an array of “family-friendly” benefits, such as parental leave, child and elder care resource and referral programs, and flexible schedules. But Zeitlin and Rapoport wanted to delve deeper—to look at organizational structures and the culture of work practices—in order to shed light on the sources of the widespread conflict between work and personal life, which, despite well-intended policies, stubbornly persisted.

The Ford Foundation itself had contributed substantially to the development of those progressive and innovative policies, as part of a long-term initiative to support the advance of women’s rights on a broad front, including expanding their opportunities

for employment. Focused at first on securing legal rights—for example, through equal-opportunity legislation—this initiative had moved on to address issues, such as the need for benefits and flexibility, raised by women's entrance into the workplace. Zeitlin's 1989 program paper, *Work and Family Responsibilities: Achieving a Balance*, provided an overview of this effort and the plans to continue it.

Yet by the end of the 1980s, it was evident that family-friendly policies alone were not sufficient. Few people were using them, and since nothing else had changed, those who were—mainly women—risked career repercussions. It seemed there was a need to make more systemic changes in work cultures and structures.

Tackling this complex problem clearly required the active participation of the companies under study. Zeitlin and Rapoport were proposing an “action research” approach, designed to generate new knowledge by changing a system and then studying the results. Outside researchers and company members would jointly identify the barriers in organizational structures and culture that were keeping people from using existing work-family policies. Together the researchers and their company partners would design experimental changes in work practices aimed at eliminating those barriers, and the researchers would track and assess the experiments and their effects. But the uncertainties in this approach made the project a tough sell to corporate executives. The researchers could not say at the start just what the work practice changes might be or what effect they might have on the organization's performance. As Zeitlin later wrote, “We were seeking to support companies that wanted to examine and were willing to try to change the work culture and organization of work. Still, no one was confident this could be done without negative consequences to the bottom line.”<sup>1</sup>

Xerox Corporation was one of three companies that signed up to take a chance on this initiative. In 1991, a team of academic researchers co-led by Lotte Bailyn launched an action research project jointly with Xerox, which aimed to use work-family issues as a catalyst for organizational change at the level of work practices. Joyce Fletcher was a member of the team. Rhona Rapoport provided support and external perspective while serving as coordinator of the overall Ford Foundation-funded initiative. The Xerox project and its results—in *particular, the surprising and hopeful finding that it is possible to restructure work in ways that actually enhance organizational effectiveness while making the workplace more equitable and improving the quality of working people's lives*—provided the inspiration for this book, as well as much of the case material and methodological understanding it presents.<sup>2</sup>

This initial project and the others that followed made a significant departure from the established work-family field. In the first place, they reframed the issues in terms of gender, directing attention to the role played by strongly held, usually tacit, assumptions about how work should be done, assumptions that are linked to the traditional separation of work and family spheres and to stereotyped views of the roles of men and women in each. An example is the assumption that all employees fit the mold of the traditional middle-class married man: the family's sole breadwinner, for whom work is the highest priority and who is willing and able to devote whatever time and make whatever sacrifices might be called for to "get the job done." Such gendered assumptions—though they no longer fit, if they ever did, a large proportion of the workforce, male or female—are deeply embedded in work cultures, structures, and practices. They are largely responsible for persistent gender inequities in the workplace, and they are barriers to the success of work-family policies.



The Xerox project and others like it have also shown that these assumptions often support work practices that are inefficient and ineffective in the current work environment. Hence the unexpected linkage between improved performance on the one hand and greater gender equity, with reduced work–personal life conflict for everyone, on the other. In the Xerox project report, *Relinking Life and Work: Toward a Better Future* (1996), we identified in this linkage a “dual agenda” for organizational change. Since then, we have seen mounting evidence that the Dual Agenda is a valuable tool for improving organizational effectiveness while addressing the problems that work-family policies and benefits alone have proved unable to solve.

Our purpose in this book is to present the conceptual framework and the organizational change method behind the Dual Agenda and the results it has produced. We call this approach Collaborative Interactive Action Research (CIAR). In presenting CIAR, we are conscious of its emergent nature and of the many questions still to be answered about it, but we are confident that we are on the right track.

Most important, we have found that this method—by going to the level of the underlying assumptions about gender, work, and success that impede *both* equity *and* effectiveness in the workplace—can unlock tremendous creativity and energy for change. And although our focus has been on gender, there have been occasions when a Dual Agenda project has opened up space to examine other aspects of diversity as well. As we and others continue to develop this method, we hope to be able to expand that space so that the full range of equity issues can be raised and addressed. Yet we cannot wait to share it more broadly when at present both the need and the opportunity for change are great.

This book does not offer a simple prescription for how to achieve Dual Agenda results, because there is none. Each organization, and only the organization itself, has the requisite knowledge: the intimate understanding of the way its work gets done as well as access to the underlying assumptions dictating that the work must be done a particular way. The solutions one work group crafts for itself can suggest and inspire change in others but are not automatically transferable. What the book does offer, drawing on case material from projects in more than a dozen different workplace settings, are ways to think about this process so that organizations and the people in them who are so inclined may embark on a similar journey. We also share our understanding of some of the principles involved as well as the particular challenges we have encountered participating in Dual Agenda work.

All of this we present within a conceptual framework that addresses the question of why gender inequities and work–personal life conflict have been such intractable problems for our turn-of-the-century work organizations. Thus while we have no prescription, we do offer an analysis pointing to themes and issues that are common across many different organizational types and cultures. To the extent that this analysis rings true to our readers, we hope they will be motivated and armed to begin examining and questioning some of the unstated assumptions that govern how work is done in their own organizations, large and small, for profit and nonprofit.

We believe that many people may find this book of some interest: those concerned with gender equity; those wrestling on some level with issues of work–family or work–life “balance,” which we call work–personal life integration; and those interested in organizational change. The analytical concepts and research

findings we present are relevant to various disciplines—sociology, anthropology, management—and to all kinds of work organizations. The Dual Agenda message offers good news to forward-thinking CEOs, human resource personnel, and line managers that there need not be a trade-off between addressing employees' work–personal life conflicts and improving organizational performance. Though our research has focused primarily on the United States, it is relevant to other industrialized and industrializing countries as well.

Our hope is that any reader who has experienced gender inequity or work–personal life conflict will find the book a source of insight and ideas, which they may be able to use both in their own lives and in pressing for change in their workplaces. The results achieved so far offer encouragement, and the central chapters of this book provide a way to get started. The Appendix shows how the ideas and the method emerged and how they connect to similar work being pursued by others. As more people work with these ideas, they will continue to deepen the understanding of the method and its underlying principles and by doing so will push the boundaries of what is possible.

We are profoundly grateful to the many people who have worked with us and influenced our thinking on the issues discussed in this book. At one point, in the spirit of collaboration we consider so important to this effort, we tried to bring many of these people together in a joint effort to write this book. But it was not to be. We had a lively and valuable two-day retreat where we were joined by Deborah Kolb, Maureen Harvey, Roy Jacques, Jan Jaffe, Deborah Merrill-Sands, and Ann Rippin. Gill Coleman, though unable to join us at that time, contributed from a distance. Debra Meyerson and Robin Ely, who were not

at the retreat, participated in an early planning meeting. These sessions produced insightful conversations and some chapter plans. But we could go no further. It seems we still have much to learn about what fosters and what impedes true collaborative effort.

Our gratitude to all these participants remains. We mention them here, refer to their published work throughout the book, and provide a bibliography of Dual Agenda–related writing. And in the Appendix, “The Book in Context,” we acknowledge their contributions further, as part of an effort to illuminate the strands of theoretical and practical development that have come together to create a field of Dual Agenda work. Having just four authors has enabled us to achieve a level of synthesis and a clarity of voice that would likely not have been possible with a much larger group, but we are sensible of the loss of richness and multiple perspectives it also entails. We are also aware that publication brings up complicated issues of attribution, and we want to apologize immediately for any omissions.

The original Xerox action research team consisted of Lotte Bailyn, Susan Eaton, Joyce Fletcher, Maureen Harvey, Robin Johnson, Deborah Kolb, Leslie Perlow, and Rhona Rapoport, all of whom together created the insights from that project. At various points in some of this work we were also joined by Amy Andrews, Vicky Parker, and Mary Young, whom we thank for their efforts. Early on, we had the benefit of an advisory committee to the project, including Arlie Hochschild and Edgar H. Schein. Following the conclusion of the Xerox project, Deborah Kolb and Maureen Harvey continued to work with us for some time in a consulting group specializing in Dual Agenda work. And now we have been joined by Bettye H. Pruitt, who has enhanced our understanding of the method by helping us write about it.

Deborah Kolb brought a negotiation framework to the Xerox project and a keen conceptual eye. Since then, through her founding of the Center for Gender in Organizations at the Simmons Graduate School of Management, she and Deborah Merrill-Sands, her codirector, have brought together a group of people who have significantly contributed to our understanding of gender in organizations. Deborah Merrill-Sands has also led a number of Dual Agenda projects in which we have participated and gained much experience.

Maureen Harvey, a skilled interventionist, has participated in many of the projects described in this book and has helped us see things we were not always attuned to. Gill Coleman, Jan Jaffe, Roy Jacques, and Ann Rippin have brought thoughtful insights based on their own experiences. Gill Coleman also made a significant contribution to our understanding of the methodological context of CIAR, as did Mary Young. Robin Ely and Debra Meyerson have had important insights on these issues, and their approach intersects with ours in many ways. Debra Meyerson also played a leading role in one Dual Agenda project.

None of this work, it must be said, would have been possible without the full support, in so many different ways, of June Zeitlin and the Ford Foundation. We are grateful for June's imaginative vision and the willingness of the Ford Foundation to support such a risky enterprise as the Xerox project and subsequently to provide financial support for writing this book. The experiences of the two other teams originally funded by the foundation have also helped us understand the issues involved: Barbara Miller from Artemis and her team, especially Roy Jacques and Erica Pelavin; and Ellen Galinsky, Jim Levine, and Dana Friedman from the Families and Work Institute. And our gratitude goes to the people in the organizations we have worked

with—our action partners—for putting up with us and learning with us.

Kathe Sweeney of Jossey-Bass has been a spirited champion of the ideas in this book, a sharp critic of our writing, and a helpful adviser. Her support throughout is much appreciated. And we are most grateful for the responsiveness of Jeff Wyneken during the production process. We also thank three anonymous reviewers whose detailed reports helped significantly in the final revisions.

We also want to thank each other for a valiant effort at collaboration. Each of us has played a different role in the production of this book: some have written more than others; some have edited or provided examples or kept the thinking clear and logical. In her own way, each has contributed equally to the final product.

Finally, we thank Bernard Bailyn, William C. Fletcher, and R. Bruce Pruitt, husbands who have lived the issues of gender equity and work–personal life integration with us, both personally and intellectually. Robert N. Rapoport, who died in 1996, deserves special acknowledgment. As the historical overview in the Appendix indicates, he was a full partner with Rhona in a long career of research and writing about work and family. He participated in originating the idea of writing this book, and his insights have informed both its spirit and its content. His continuing involvement was greatly missed.

*October 2001*

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# The Authors

**Rhona Rapoport** is director of the Institute of Family and Environmental Research, a nonprofit educational trust located in London. In 1994–95 she was a scholar in residence at the Ford Foundation, and in recent years she has been a Distinguished Fellow and adviser at the Center for Gender in Organizations at the Simmons Graduate School of Management in Boston. Born in Cape Town, South Africa, she earned her bachelor of social science degree at the University of Cape Town and her doctorate in sociology at the London School of Economics. She subsequently completed training as a psychoanalyst at the London Institute of Psychoanalysis. Her publications—many written in collaboration with her late husband, Robert—include *Dual Career Families* (Penguin Books, 1971); *Leisure and the Family Life Cycle* (Routledge & Kegan Paul, 1975); *Fathers, Mothers and Society* (Basic Books, 1977); and with Peter Moss, *Men and Women as Equals at Work* (Thomas Coram, 1990). For twenty years, she has been a consultant to the Ford Foundation working on affirmative action programs in the United States and in developing countries and on work and family issues. A major concern in her work is the issue of equity between men and women. To this end, she has collaborated with action research projects in the United States and England, as well as on the development of

a training program on organizational change and work-family issues for advancing diverse groups in the new South Africa. She is currently engaged in a review of the movement on work-personal life integration, *Looking Backward to Go Forward*.

**Lotte Bailyn** is the T Wilson (1953) Professor of Management at MIT's Sloan School of Management, where she has taught for thirty years. She holds a bachelor of arts degree from Swarthmore College in mathematics and a doctorate from Harvard in social psychology and is a Fellow of the American Psychological Association. Her primary interest is in the conditions of work and how they affect the careers and lives of technical and managerial professionals. Her research deals with the relation of organizational practice to employees' personal lives and has emphasized such workplace innovations as telecommuting, flexible scheduling, work-family benefits, and work redesign. She is the author of numerous articles and a number of books, including *Living with Technology: Issues at Mid-Career* (MIT Press, 1980), and coauthor of *Working with Careers* (Columbia University Press, 1984). Her book *Breaking the Mold: Women, Men, and Time in the New Corporate World* (Free Press, 1993) sets out the hypothesis that by challenging the assumptions in which current work practices are embedded, it is possible not only to meet the goals of both business productivity and employees' family and community concerns but also to do so in ways that are equitable for men and women. The book spells out the contours of how this might be done, and the work she and others have been engaged in during the past decade, much of it detailed in this book, has supported this basic proposition.

**Joyce K. Fletcher** is professor of management at the Center for Gender in Organizations, Simmons Graduate School of Man-



agement, Boston, and a senior research scholar at the Jean Baker Miller Training Institute at the Wellesley College Centers for Women. Before coming to CGO, she spent fifteen years as an associate professor of cooperative education for the College of Business Administration at Northeastern University. She received her doctoral degree in organizational behavior from Boston University's School of Management, and her dissertation, "Toward a Theory of Relational Practice: A Feminist Reconstruction of 'Real' Work," explored the social construction of gender in the workplace. Fletcher teaches courses in organizational behavior, specializing in the effective leadership of individuals and groups. In her research, she uses relational theory to study a wide range of workplace issues, including motivation, power, influence, equity, and gender. She has consulted in both the corporate and not-for-profit worlds and has published widely in education and management journals, including the *Harvard Business Review*. She is a frequent speaker at national and international conferences on the topic of women, power, and leadership. Her recent book, *Disappearing Acts: Gender, Power, and Relational Practice at Work* (MIT Press, 1999)—which was designated a finalist for the 2001 George R. Terry Book Award for outstanding contribution to the advancement of management knowledge, presented annually by the Academy of Management—addresses the subtle dynamics that often "disappear" women's leadership behavior at work and suggests practical strategies to enhance personal and organizational success.

**Bettye H. Pruitt** is the president of Pruitt & Company, Inc., a research and consulting firm devoted to realizing the practical value of history in organizations, and a trustee of the Society for Organizational Learning. She holds a doctorate in history from Boston University and has worked in the field of organizational