

*Exploring factors that shape the inclusion and  
nature of Work–life Balance policies within collective  
agreements in New Zealand*

by

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## **Abstract**

The aim of this research is to identify factors that influence the nature and inclusion of work–life balance (WLB) policies within collective employment agreements (CEAs) in New Zealand organisations. Due to the increasing challenges of dual careers, aging population and single parent families, WLB practices are progressively becoming more significant issues amongst employees and management in New Zealand workplaces. As a result, identifying these factors is crucial in informing organisational human resources policy development, its design and implementation on issues pertaining to WLB. Similarly, it informs the government on policy changes and legislation, at the same time enlightening trade unions on bargaining strategies.

In the first phase, an in-depth analysis is carried out on collective employment agreements (CEAs) housed within the Industrial Relations Centre at Victoria University of Wellington. The focus is to develop a comprehensive coding typology of collective employment agreement (CEA) provisions which constitute WLB measures. This process is carried out in order to identify WLB provisions in CEAs negotiated from 1998 to 2008. The second phase is concerned with the identification of any WLB policy provisions outside those included in the CEA. This dimension is critical to the research as it offers insights into the extent to which companies have shifted beyond the statutory minimum for WLB arrangements and the factors that have prompted them to take these voluntary actions.

The study covers the period from 1998 to 2008. It is critical to evaluate this subject between these two benchmark years, as it allows ample time after the enactment of two cornerstone employment relations Acts – the *Employment Contracts Act 1991* (ECA) and the *Employment Relations Act 2000* (ERA). Second, and related to this, they enable a comparison of WLB initiatives under quite different social policy, political, economic – and indeed, bargaining – arrangements (Deeks, Parker, & Ryan, 1994; Rasmussen, 2009).

The study discovered that the inclusion of WLB policies in collective employment agreement in New Zealand was mainly determined by legislation, in particular the Employment Relations Act 2000 and The Employment Relations (Flexible Working Arrangements) Amendment Act 2007. These two legislative changes made a positive impact in the recognition and response to the demands of employee well-being.

Similarly, there are other factors that made an impact in the inclusion of WLB policies within CEAs. These include industry trade union density and female participation rate at industry level, the type of industry (health and community services, education, government administration and defence services, finance and insurance services being more prominent providers) and type of organisation(whether public or private ownership). It emerged that public organisations are at the forefront in terms of providing WLB policies. The research highlight the significance of ensuring that organisations recognise the issues pertaining to WLB, at the same time recognising the role of trade unions and collective bargaining as an effective mechanism for the instigation of WLB policies.

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# **Chapter One: Literature Review**

## ***1.0 Introduction***

Work–life Balance (hereafter, WLB) is a discursive phrase in employment relations debate that illuminates the rising expectations of women to be earners as well as carers; of men to become more involved in domestic responsibilities; and the desire by all workers for leisure time. The debate encompasses tensions within individual lives, households, policy frameworks and work organisations. WLB has become a norm both in New Zealand and internationally, attracting those with a major concern for the quality of working life and its influence on the broader aspects of non-working life (Blake-Beard, Ingols, O'Neill, & Shapiro, 2009). Such policies have gained high priority, as both women and men place greater importance on its provision when considering the role of jobs and workplaces (Guest, 2002). Nonetheless, successful action to help employees achieve WLB has been hindered by a slow development of policies and a failure to translate policies into practice (Rigby & O'Brien-Smith, 2010). Hence, trade union intervention may help resolve these problems; however, evidence as to their role is limited.

In response to the increasing interest in the provision of WLB, many organisations and employees seek better ways to manage the conflict between work and non-work life; yet there is a growing gap between the stated norm and the practice. As noted in a recent Work–life Balance Project (2004) report, some people face significant barriers to achieving a work–life balance in their lives. Work hours and work intensity are cited as being key factors in the ability to cope with the balance between work and life (Dyson, 2004).

Stress, on the other hand, is perceived as a manifestation of the work–life imbalance perpetuated by working long hours or too much work (Guest, 2002). In addition, it has been shown that the type of job can shape the nature of WLB uptake. Fagan, Jones and Walthery (2007) note that some jobs are structured in such a manner that they lack time and space boundaries (the 'spillover effect' in the new economy) and require workers to be on call and accessible all the time, unable to 'switch off' during family and leisure time. It is partly for such reasons that WLB is often defined by its absence, or in terms of work–life 'imbalance' or work–life 'conflict' (Guest 2002).

Over the last decades, New Zealand has witnessed significant legislative developments especially in relation to flexible working. In particular, the passing of the Employment Relations (Flexible Working Arrangements) Amendment Act in 2007 provides employees with the right to request flexibility in the organisation of their hours of work and for domestic related leave to take care of children, the disabled and elderly. The purpose underpinning this change in legislation is to ensure that New Zealand's workplaces are attractive, innovative and productive and that all people have the opportunity to participate in well-paid and meaningful employment (Department of Labour, 2010a). The discourse on gender equality in care has set in motion policies aimed at increasing fathers', single parents' and dual care capabilities for WLB.

At the organisational level, progress has been relatively slow (Ravenswood, 2008). Attributed to this is the slow adoption and implementation of policies, with employees reported as feeling inhibited from taking advantage of flexible working opportunities. As such, the current research focus is to identify whether the role of trade unions and collective bargaining may attract an alternative means of bringing change. Trade unions are regarded as playing a crucial role in advancing provisions and ensuring that legal entitlements to equal treatment are given genuine effect in the employment relationship. It has also been noted that trade unions can directly affect both labour market outcomes and the wages, benefits and working conditions of their own members and indirectly affect those of non-members (Hyman & Summer, 2007). Hence, the object of this research study is to *explore the factors that shape the inclusion of WLB policies within collective bargaining and in particular within collective employment agreements (CEAs)*.

The next section presents a brief overview of the WLB history, followed by the definition of the phenomenon. The engagement of trade union on issues of WLB is also reviewed, which very much sets the scene for their role in collective bargaining. To enhance the understanding on how different stakeholders approach WLB issues, different perspectives are analysed. In conclusion, the chapter explores the various factors that influence the nature and extent of WLB policies.



## **1.1 The WLB phenomenon**

Before considering the role of trade union intervention in the provision of WLB policies, it is worthwhile outlining the emergence and definition of this phenomenon. Understanding the origin of the WLB phenomenon is critical in evaluating the factors that have driven the recognition of work–life balance as a vital issue for everyone--women, men, parents and non-parents, singles, and couples.

The concept of WLB emerged in a resurgent growth of corporate support policies within Western contexts (Byrne, 2005). During the 1960s and right through the 1980s, WLB issues were considered to be prominent problems with working mothers, who struggled with the demands of work and family responsibilities. At this stage, WLB issues were considered to be the responsibility of management and thus subject to managerial influence, with trade union representatives having little or no impact on the management agenda. Two broad reasons for this conception were highlighted. Firstly, WLB policies typically encompass flexible working, which was perceived as a threat to collective, protective rights and was usually employer led rather than employee or trade union led (Ackers, 2002). Secondly, trade union leadership and membership were predominantly male domains, and WLB issues were considered ‘women issues’ and, as such, clashed with masculine cultures (Dickens, 1988).

This ideological assumption was carried during the 1980s through the work of Becker (1981) who advocated for the efficient family division of labour. He argued that society was better-organised when it was structured within a framework of gender-based division of labour and low market wage rates for married women. Therefore, women were meant to raise children, while men were the breadwinners. This marked the *economic view* of work and family life.

From the 1960s, as the influx of women into the labour force grew, research in certain contexts tended to focus on working mothers or dual earner families, while issues about stress and burnout were highlighted in work–family conflict research (Lewis & Cooper, 1999). Similarly, those who advocated a feminist view preferred such terminology as *work–family* and *family-friendly policies*, with an implicit focus on women (especially mothers) (Lewis, Gambles, & Rapoport, 2007).

This focus has shifted to *work-life*, the precursor of the more recent WLB. This linguistic shift indicates a broader and more inclusive way of framing the work and life debate, one that engages men and women, both with and without children or other caring commitments. Moreover, in the contemporary world, as Lowe (2005) asserts, the issues have taken a different twist – in particular, the ageing of populations, strong economies, and historically low unemployment pose new challenges in terms of skill and labour shortages, productivity and worker retention. In response to these increased pressures, organisations are embracing the development of new human resources practices, including the implementation of WLB.

WLB has gone mainstream, becoming a dominant discourse built on a language of large organisations, with hundreds of dedicated Internet sites helping spread the information. Furthermore, the enactment of legislation on work and family issues has enhanced the significance of WLB policies in the functioning of many organisations. Countries such as the United Kingdom, New Zealand and Australia have actively supported WLB as an explicit policy goal, launching campaigns that focus on promotional activities and the voluntary compliance of employers to develop and implement WLB practices in their organisations (Todd, 2004). On the other hand, numerous world bodies, including the International Labour Organisation (ILO) and the United Nations Development Programme (UNDP) have, in recent years, encouraged balance coupled with honouring workers' rights, with the intention to utilise WLB initiatives as tools for equality, business development, employment and educational and social development across the world (International Labour Organisation, 2009).

In summary, the significance of managing an employee's WLB has increased markedly over the past 20 years (De Bruin & Dupuis, 2004), all being directly impacted by both the changing nature of jobs and demographic changes. Jobs have become more complex, and employees have been exposed to extreme pressure to produce quality results in shorter time frames and with fewer resources (Hosie, Forster, & Sevastos, 2004). In addition, the demographic make-up of the labour force (that is, gender, ethnicity, dual career couples, religion, multi-generational workplaces, and so on), and the changes in the nature of employment contracts have necessitated that organisations effectively manage their employees' well-being, stress levels and job satisfaction (Greenhaus & Powell, 2006).

## **1.2 Defining Work Life Balance**

WLB is a contested phrase that has gained traction in both academic and practitioner debate; however, the elusiveness of the phenomenon is evident in the many and varied definitions (Greenhaus, Collins, & Shaw, 2003). A point of disagreement in the definitions is over the term *balance*, which, implicitly, may conjure up the image of a set of scales in a state of equilibrium. This concept gives rise to the need to recognize that WLB can have both objective and subjective meaning and measurement. Balance occurs when there is an equal distribution of weight or amount. However, this definition presents problems for WLB; since life is more fluid: attempting to schedule an equal number of hours for work and for personal activities is usually futile and unrealistic. Nonetheless, the balance concept may find relevance in both the physical and psychological states. Empirically, it is highly observable when someone has lost balance due to long hours of work, as it is when they have a better balance. Stress or happiness can be, though subjective, key indicators of the state of an individual (Guest, 2002).

It is equally important to note that there is no standard solution to the WLB issue, and the right balance is a very personal thing that varies for different people and at different stages of a person's life (Bird, 2006). This suggests that, to some extent, WLB is dependent on the 'career' or 'stage of life' that a person occupies. For example, the 'right balance' at the start of a new career will be different from when individuals are nearing retirement. In the same way, the 'right balance' for single men/women can change when they marry, or if they have children. In the same way, some individuals may prefer to increase their leisure time, while others can choose to spend long hours at work in order to accomplish career objectives, or even perhaps because of a limited life outside work. WLB framed from this position focuses more on achieving a balance based on personal context. Hence, the issue is one of accommodating life choices, not the pursuit of 'right balance'.

The second point of contention on the WLB metaphor stems from the assumed separation of work and life, with some scholars suggesting terms such as 'work-life integration', 'work-life interface', work-life mosaic, work-life reconciliation or work-life coordination (McPherson, 2007). These alternative terms point to the movement away from the separation aspect towards integration, indicating that, for some, integration as opposed to balance may be the aim.

The dichotomy between the two views is characterised by the suggestion of, on the one hand, separating the two components *work* and *life* (Haar, 2001), while, on the other, attempting to compartmentalise them (Collins, Greenhaus, & Shaw, 2003). The separation aspect is further complicated by the lack of boundaries between work and life. In most cases, the explanation is simply put as a contextual difference, whereby work is conceived within the frame of paid employment and life includes activities outside of work (Guest, 2001).

In spite of the contest, research conducted in 2003 noted that, at times, working from home can create more imbalance, as the boundary between the domains of work and life become more indistinct (UMR Research Ltd, 2003). However, Harvey et al. (1999, as cited in Felstead, Jewson, Phizacklea, & Walters, 2002) contend that employment is the purchase of workers' time and presence, but only for a certain time; therefore, spaces and times of employment have boundaries. Thus, employees need to negotiate these boundaries, both in the sense of establishing where they lie and in managing the process of crossing from one domain to another. From this viewpoint, WLB is the relationship between the institutional and cultural times and spaces of work and non-work in societies in which income is predominantly generated.

Related to the context issue is the concern as to what contributes to WLB. It has been suggested that WLB is about having a measure of control over when, where and how individuals work (Kelliher & Anderson, 2008). Others have argued that achieving a balance between work and life is more about the achievement of role-related expectations that are negotiated and shared between an individual and his/her role-related partners in the work and family domains (Grzywacz & Carlson, 2007). The second argument is more inclined to satisfaction and superior functioning at work and at home, with a minimum of role conflict. The New Zealand Department of Labour (2003, pg. 1) conceive that they should be an '*effective management of the demands between paid work and the other activities outside work that are significant to people, including spending time with family, taking part in sport and recreation, leisure and volunteering, or undertaking further study*'. This definition does not imply that work is wrong or bad but that it should not create a barrier to other things that matter to people. The current research study adopts this definition, as it enables the examination of union engagement with WLB issues.

### ***1.3 Trade Union engagement in WLB issues***

In many developed countries where there is public policy interest in WLB, trade unions have been considered to have a significant role to play. This is also supported by research which suggest that WLB as a condition of work result from trade union involvement (Hyman & Summers, 2007). Unions affect labour market outcomes, the wages, benefits and working conditions of their own members and indirectly affect those of non-members. By providing workers with a “voice,” unions create a media of communication between company owners and the employees. In a sample survey of pregnant women, Glass and Fujimoto (1995) discovered that union status is one of the strongest predictors of WLB policies. Similarly, Bardoel, Moss, Smyrnios and Tharenou (1999) noted that, in Australia, unions are positively associated with leave options.

A surge in convergent approaches and strategies to inculcate gender equality indicates a shift towards WLB (Milner & Gregory, 2009). As trade unions are becoming feminised in terms of membership and leadership, the WLB subject is becoming more significant and opportunity structures on WLB balance policies are beginning to open up. They include the regulation of working time, which has been shown to be clearly related to the degree of trade-union involvement in bargaining on WLB. Secondly, trade unions can promote WLB issues in the workplace through lobbying for legislative changes and help employees to exercise existing legal rights (Budd & Mumford, 2004). A good example is the New Zealand Council of Trade Unions’ (NZCTU) campaign for ‘Get a Life’ (New Zealand Council of Trade Union, 2003). In addition, NZCTU monitors the provision, and advocated for extended application of, paid parental leave and breast feeding breaks so that New Zealand can comply with ILO Convention 183 – Maternity Protection, 2000.

A third opportunity structure is provided through a good partnership between trade unions and the employers. As pointed out by Gambles et al. (2006), organisations are key actors in the complex, multi-level dynamics that result in WLB policy and practice, and central to this effect is the significance of the unions’ relationship with employers. Similarly, in response to labour market and social changes, trade unions can also approach issues of WLB by engaging in negotiating positive workplace flexibility. This approach entails the implementation of sustainable WLB policies for employees as well as a high performance workplace. This research analyse the role of trade unions in shaping and inclusion of such policies within CEAs.

For example, the economic, labour market and social pressures, as well as a strong European Union agenda, have been influential in the implementation of flexible working arrangements in the UK (Morris, 2004). Consequently, trade unions have signed up for the high performance workplace initiatives, utilising the European model of social partnership to adapt working arrangements to the needs of employees. Although this approach is inclined to the economic perspective of developing a flexible and competitive European economy, it provides employee security and facilitates the reconciliation of work (organisational objectives) and family life (employee expectations). However, there are other models that could be adopted in substitute of the bottom line motive.

The reconciliation or social partnership approach established between employers' organisations and trade unions can be significant in building foundations of equality legislation and workplace equal opportunity policies to develop sustainable models of positive flexibility and WLB. Initiatives in the UK (Morris, 2004) proved successful in transforming the relationship between management and trade unions, which previously was characterised and defined by adversarial setting, to one of a mutual understanding of problems and the development of joint resolutions. In both projects, new ways of delivering services were established, meeting the demands of both employees and business needs.

Secondly, the intervention of trade unions in issues of WLB can facilitate the translation of policies into practice and ensure that legal entitlements to equal treatment are given genuine effect in the workplace. Despite the increasing attention on the WLB phenomenon, its success has been hindered by the lack of action in assisting employees to manage their work and life outside work (Rigby & O'Brien-Smith, 2010). This mismatch is mainly due to the lack of adoption and implementation of policies by employers, leaving employees feeling inhibited from taking advantage of opportunities (Kodz, Harper & Dench, 2002). However, the situation provides an opportunity for trade unions to capitalise and bring WLB issues to the forefront of bargaining. Similarly, there is a potential for trade unions to extend provisions to those in the lower class forms of work (low skilled) and ensure practice bends to social justice, and not to a pure business logic (Dickens, 2000).

Thirdly, the influence of trade unions in resolving WLB issues can be improved by engaging in national strategies, such as evidence-based campaigns aimed at both legislative change and industrial bargaining. In a qualitative study aimed at examining the meaning of WLB issues to union representatives and the development of union strategy, Rigby and O'Brien-Smith (2010) discovered the effectiveness of leading work and life issues from the top. Comparing the two trade unions, the National Union of Journalists and the Union of Shop Distributive and Allied Workers, the findings suggested that adopting a strategic integrative approach at all levels (political, corporate and store levels) is more effective than relying on a traditional distributive bargaining approach. It is crucial to learn that national campaigning and legislation can play a significant role in establishing a favourable context for negotiation and the advancement of policies. Trade unions can assist organisations in the design of appropriate policies, citing not only diversity in cultural factors (such as member expectations), but also structural factors such as the gender of the membership. Gerstel and Clawson (2001) assert that the extent to which women are members and leaders of trade unions enhances the degree of union support for WLB issues. It is not just a matter of the gender of workers, but of the union leaders as well, for those unions with a higher proportion of women leaders will have the power, personnel and commitment to advocate for greater WLB benefits. Therefore, the characteristics of union membership, leadership and the internal systems have a bearing on the nature of bargaining activity on WLB (Heery, 1998).

### ***1.4 Perspectives on WLB***

Different perspectives have been applied to the role of the WLB phenomenon. These include the political, economic and societal perspectives. Tensions may exist between these perspectives as different stakeholders (trade unions, government, employers and the community) attempt to find relevance of WLB initiatives. Hence, as trade unions pursue the goals of WLB, it is critical to identify the domain from which they derive the motive or perspective. The perspective or the agenda driving WLB initiatives has a bearing on the provision, nature and extent of policies (Abbott & Cieri, 2008). Furthermore, drawing on a deep understanding of perspectives will facilitate the development of integration strategies that will see the achievement of sustainable WLB policies for employees as well as high-performance workplaces (Morris, 2004).

While some organisations provide a comprehensive range of WLB, others do not (Hyman & Summers, 2007). A salient example will be, where an organisation's goals are premised on the economic perspective, employees may have less choice and face more structural constraints in their access to and utilisation of WLB (Lewis et al, 2007). On the contrary, where the organisation is focused on both the economic and the social perspectives, employees through trade unions may be able to influence the decisions made by managers with regard to the provision of WLB.

This research proposes, therefore, that in examining the role of trade unions, it is imperative to understand all perspectives of WLB. This is particularly valuable for human resource management (HRM) scholars, practitioners and trade union in the design of WLB strategies.

#### **1.4.1 The economic perspective**

The promotion of WLB can be viewed as a response on the one hand to global pressures on the structure and functioning of labour markets, and on the other hand to shifting patterns of household formation and the age mix of the population (Scharpf & Schmidt, 2000). Hence, post-industrialised economies have realised the significance of maximising the labour market participation of the working-age population, while recognising that certain labour market sectors will be characterised by work that is low-paid and/or insecure (Calmfors, 1994), enabling the dual objectives of labour supply and greater flexibility. In a competitive economic environment, employers can attract better recruits by offering WLB policies alongside competitive remuneration packages, at the same time reducing costs by improving staff retention rates (Gold, 2008; Patel, 2007).

This economic view is consistent with the assertion that WLB policies are a means of maximising labour force productivity (Bloom, Kretschmer, & van Reenen, 2006), since they contribute to a significant reduction in extended hours and fatigue, which have a negative effect on productivity. By engaging with the family life of an employee, organisations get to manage and shape the 'negotiation' process that employees engage in and therefore can raise performance expectations. Konrad and Robert (2000) suggest the use of an exchange framework whereby, in return for the provision of WLB policies, employees offer discretionary effort, thereby increasing productivity.



Additionally, a substantial proportion of the literature affirms the implementation of WLB policies as a potential strategy to minimise stress and contribute to a safer and healthier workplace by combating fatigue, thus reducing the chance of accidents occurring in the workplace (Dawson & Zee, 2005; Fagnani & Letablier, 2004; Kerry, Lisa, & Keith, 2009). To this extent, employers are likely to welcome the business case rationale for introducing WLB policies, as it will improve bottom-line business outcomes such as recruitment, retention and performance (Baird & Charlesworth, 2007).

Apart from assisting with the supply of the low-skilled and low-paid labour required in service industries and throughout the labour market periphery, such intervention will also enable the retention of the highly skilled (Dean, 2007). For example, employers may offer concessions in order to retain the services of professionally skilled workers, especially if the employer has previously invested in their training and careers (Dean, 2002). In a piece of action research conducted in the UK hospitality industry, Doherty (2004) found the business case factor to be a strong motivator for employers to implement WLB policies.

This has also proved to be the case in New Zealand: an Equal Employment Opportunity Trust (2006) survey indicated that, in comparison with all other factors, the foremost reason for having WLB policies was to recruit the best employees. Productivity and general business benefits were also significant; however, social responsibility featured as the last. Hence, within the New Zealand context, given the current labour shortage, particularly for skilled workers (New Zealand Conservative, 2008), introducing policies for these reasons could be seen as an imperative.

### **1.4.2 The societal perspective on WLB**

The societal perspective on WLB contends that, in societies, the excessive demands of work present distinctive issues that need to be addressed. The pressures of work have intensified, perpetuated by advances in information technology and information load, the need for speed of response, the importance attached to quality of customer service and its implications for constant availability (Guest, 2002). This is reflected in long hours worked, more exhaustion and the growth of evening and weekend work, leaving less scope for quality family time.

There is a great concern that the quality of community and home life is deteriorating. The consequences include the growth in single-parent families, increases in juvenile crime, more drug abuse and a reduction in community participation. Addressing WLB issues has been perceived as one solution that could improve society, a factor that has seen many employers and employees embracing the flexible working conditions.

In adopting the social perspective, trade unions have played a crucial role in advocating for employee well-being, bargaining for shorter working hours and better working conditions. Representing a diverse population, a collective voice through trade unions facilitates the representation of the low level workers as well as women seeking to break through the glass ceiling (Morris, 2004). Social policy, on the other hand, has played a mitigating role in alleviating the corrosive nature of the wage labour process, while also facilitating particular forms of household and shaping the relationship between work and home (Pascall, 1986).

The WLB phenomenon encapsulates the manner in which these aspects of social policy are changing. The debate goes further than the direct regulation of terms and conditions of employment; instead, it is more about the boundaries between the market and families in terms of sources of income on one hand and sources of care on the other. Existing research clearly indicates that household strategies are fast evolving to adapt to more flexible working patterns (Harkness, 2003). This can be viewed as continuous development in the household structure since Becker's (1981) economic theory. He applied his theory to the most sensitive and crucial personal decisions, such as choosing a spouse or having children.

Based on the efficient division of labour in households, Becker (1981) applied the basic economic concepts of maximising behaviour to analyse the allocation of time to child care as well as careers. Nevertheless, the traditional household structure has altered due to a number of recent trends. These include the influx of women in the workforce and the changing attitudes of men towards child care. Hence, the role of men as the breadwinners has been transformed.

### **1.4.3 The political perspective on WLB**

The world has considerably changed as characterised by transformation in the ideas and practice of rule across the majority of Western nation states, including New Zealand. Premised not on universal social protection or social welfare, the majority of Western states espouse a relationship of mutual interdependencies between the government, freely acting citizen, and the demands of the economic market, achieved through policy projects that encourage the participation of every citizen in the workforce (Giddens 2007). The main agenda is based on the motive to incorporate those who have been marginalized, including minority groups such as women, the handicapped and those from other ethnicities.

As the forces of globalisation, new technologies and business restructuring continue to grow, new challenges are appearing that distort the long-established patterns of paid work while imposing new burdens on families, individuals and households. The tendency to work long hours continues, and the possibility of achieving a satisfactory WLB is becoming an elusive goal for most workers; hence the call for government intervention (Ravenswood, 2008). State engagement on WLB issues signifies mutual stakeholder interdependence between government, trade unions (employees), and the employers.

Achieving WLB holds high stakes as it will ‘aid employee recruitment and retention; reduce absenteeism; improve the quality of peoples’ working lives; match people who wouldn’t otherwise work with jobs (and thereby) benefit families and communities” (Department of Labour, 2003). In support of working parents, there have been various forms of government legislation related to WLB, including the enhancement of maternity rights, the introduction of parental leave, the right to time off to care for dependents, paternity leave, the right to request a change in working hours and the rights of part-time workers. Apart from compliance issues, legislation has implications for work patterns. In New Zealand, the enactment of the Employment Relations (Flexible Working Arrangements) Amendment Act 2007 was intended to encourage organisations throughout the country to accommodate more flexible working hours. Similarly, the Future of Work Programme, launched in 2003, was implemented with the intention of making employers aware of the advantages of allowing staff to work flexibly, in ways that successfully reconcile the needs of both parties (Todd, 2004).

On the contrary, Doherty and Manfredi (2006) argue that legislation and government intervention alone are not sufficient to promote organisational change. Hence, they call for the trade union intervention and the willingness of employers to develop WLB initiatives. This leads to the question of responsibility for WLB. Research by Ravenswood (2008) suggests that the responsibility for managing work and family life still remains with the individual – hence, families are encouraged to shape their lives around work rather than work being transformed to suit individual needs.

The issue of responsibility was also considered in a nationwide study conducted by UMR Research Ltd (2003) to establish and explore current understandings and attitudes of New Zealanders about the issues of WLB. The findings suggested that the responsibility for work–life balance is conceived by both employees and employers as primarily an individual role, although employers played a key role in providing a good working environment. Furthermore, while most employers were found not to support government legislation on WLB issues, several suggestions were raised as to how the government could get involved. These included raising awareness and educating both employees and employers on the benefits of maintaining a healthy balance between life and work.

In the same context, Zacharias (2006) posits that organisational policies alone cannot achieve balanced work and life conditions for the majority of workers. Hence, it is necessary to bring about government intervention in resolving work–life conflict issues. A good example is Sweden, a social-democratic welfare state whose national government has taken responsibility for the provision of work–life balance policies (Zacharias, 2006). On the other hand, liberal welfare states such as Australia and the United States rely strongly on organisational solutions to work–life conflicts (Evans, 2001).

In conclusion, taking a holistic approach to the way WLB is perceived will facilitate the design of comprehensive policies that will meet the demands of all stakeholders. For example, while the economic perspective is usually associated with short-term solutions (Doherty, 2004), Charlesworth, Campbell and Probert (2002) assert that a broader understanding of economic, social and political approach results in the medium to long term needs of the employer and the economy being met. The essence of this approach is premised on labour efficiency, which is an aid to good policy development (Charlesworth et al., 2002).

## ***1.5 Factors that influence the nature of WLB policies***

The nature and extent of policies have an effect on the achievement of WLB. WLB policies vary according to organisations, industries or firm size. Hence, they are not homogeneous in their intentions or effects. Many WLB policies are designed to fit people's lives around work by minimising any outside interference with work (Ravenswood, 2008; Yasbeck, 2004). Whether by intent or not, this can promote and encourage a culture of long work hours that is less likely to bring a 'balance' with non-work activities. However, some work-life balance policies are aimed at fitting work around the other aspects of people's lives – for example, term-time working, which is aimed at having work timed to coincide with school terms, has this goal.

There are three broad categories of WLB policy: flexible work options, specialised leave policies and dependent-care benefits. Bardoel (2003) lists the following policies and practices gathered from both New Zealand and Australian organisations.

1. Flexi-time (flexible working arrangements)
2. Job-sharing
3. Work-at-home programs
4. Top Up Re-entry provisions
5. Phased retirement
6. Special leave
7. Top Up Bereavement leave
8. Top Up Paternity leave
9. Subsidised exercise or fitness centres.

Various policies available entail that employers have a wide choice to make on what policies would best suit the individual organisation context or objective. The changeable nature of WLB means that, at one extreme, it can suggest a managerial strategy designed to maximise employee performance or, at the other end, present an opportunity to re-evaluate the ethical basis of social welfare provision in post-industrial capitalist societies (Williams, 2001).

Lewis (2002) argues that earlier notions of work–family reconciliation and family-friendly employment policies were apparently driven by the need to achieve equal gender participation. However, the policy agenda has lately diverted from equal gender participation to WLB and, more generally, the behaviour of the labour market. To this extent, the WLB balance agenda has been cushioned between two secular trends (Dean, 2007). At one end, there is a shift in global political and economic orthodoxies from a Keynesian, demand-side approach to monetarist supply-side policies; on the other, there are social-demographic shifts.

The changes associated with these shifts include a tendency in post-industrial capitalist societies toward a decline of the male breadwinner household and a corresponding rise in both dual-earner and lone-parent households. Consequently, WLB is placed in an environment characterised by market participation and policies aimed at adapting social welfare provision to the changing dynamics of the household economy (Esping-Andersen, 2002).

### **1.5.1 Industry type**

In a study conducted in the United States, Galinsky and Bond (1998) discovered that type of industry was the best predictor of the presence of work–life balance policies. The findings from this study also suggested that, in terms of provision, finance, insurance and real estate are the most generous industries, while the wholesale and retail industries were the least generous. In a similar study, Evans (2001) found that, in Australia, Japan, the United Kingdom and the United States, WLB policies were offered more frequently in the public sector.

Presumably this trend was driven by the fact that the public sector is less vulnerable to commercial pressures, while at the same time it is also more likely to have legislative requirements to be a good employer – hence, WLB policies are often one of the easier strategies for them to implement (Yasbeck, 2004). Consistent with the US findings, in Australia, the retail, construction and hospitality sectors are the least likely to provide WLB policies (Evans, 2001). In the same context, the likelihood of certain types of working arrangements being made available to employees depends partly on the industry – see Table 1.1 (Fursman, 2008).

**Table 1.1: Working arrangements by industry**

Industry	Less likely to offer	More likely to offer
Manufacturing	selecting own rosters or shifts job-sharing study leave part-time work occasionally working from home	
Retail	regularly working from home occasionally working from home study leave using personal sick leave to care for other people who are sick	
Property and Business services	being allowed to select their own rosters or shifts	regularly working from home occasionally working from home study leave
Health and Community Services		having additional leave in exchange for reduced pay flexibility in choosing when they work the number of hours they are contracted to do job-sharing being allowed to select their own rosters or shifts study leave part-time work using personal sick leave to care for other people
Education Services	having flexible break provisions being allowed to occasionally vary starting and finishing times to deal with problems outside of work being allowed to select their own rosters or shifts	occasionally working from home job-sharing study leave part-time work using personal sick leave to care for other people
Wholesale Trade	part-time work and being allowed to select their own rosters or shifts	
Hospitality	Occasionally working from home	flexibility in choosing when they work the number of hours they are contracted to do being allowed to select their own rosters or shifts job-sharing being allowed to regularly vary

		starting and finishing times for any reasons having flexible break provisions part-time work
Construction	Regularly working from home Being allowed to select their own rosters of shifts Flexibility in choosing when they work the number of hours they are contracted to do Job-sharing Part-time work	
Transport and Storage	Study leave	

Source: Fursman, 2008 (NZ Department of Labour)

These findings suggest why there are significant differences between industries, in terms of the difficulty in achieving WLB. Fursman (2008) found that, in New Zealand, employees in the finance and insurance sector and the government administration sector rated their levels of WLB higher, while those in the wholesale trade sector rated their levels of WLB slightly lower.

### 1.5.2 Firm size

The size of the firm has an influence on the type and extent of WLB policies that it offers (Yasbeck, 2004). In a study of US firms, Galinsky and Bond (1998) discovered that size of firm was a significant predictor of the presence of WLB policies. The study identified that large organisations (those with more than 1,000 employees, in this case) offered more flexible work options and longer and paid parental leave. Consistent with these findings, Comfort, Johnson and Wallace (2003) found that, where economies of scale can be achieved, other programmes such as child- or elder care were also available in large organisations. Similarly, WLB policies are more likely to be reported in large firms in Australia, Japan, the UK and the United States (Evans, 2001). However, in Canada, flexitime and telework policies are made available to employees in small workplaces (those with fewer than 10 employees) (Yasbeck, 2004).



The implementation of WLB policies can also be predicted by the extent to which organisations are concerned about public approval, and this may vary according to their size and location in the business environment (Hudson, 2007). In the same vein, large firms are more susceptible to pressure from employees because resistance could lead to public disapproval. For small organisations with lower economies of scale, however, the cost of offering formal work–life options may be disproportionately high.

It is of paramount importance to recognise that companies that genuinely promote and support WLB policies often receive community recognition as ‘good’ corporate citizens, or ‘employers of choice’ (Hudson, 2007). Similarly, public organisations are more inclined to respond to public pressure for WLB strategies, since they are more likely to be evaluated on the basis of social legitimacy norms. This is contrary to private-sector organisations, which are generally appraised by profit-related standards.

### **1.5.3 Female employees**

Konrad and Robert’s (2000) research in the United States also identified that firms with a greater proportion of female employees were more inclined to provide extensive WLB policies. The findings suggest that, of the firms employing a higher percentage of women, productivity levels were much higher for those firms that had a greater number of WLB policies.

Similarly, Galinsky and Bond (1998) noted that, in the United States, organisations with a larger proportion of top executive positions filled by women are more prone to a greater provision of WLB policies, including policies for job-sharing, part-time work, flexible time off and childcare. When women constituted a smaller proportion of a firm’s workforce, it was less likely to invest in costly options such as paid parental leave. Even so, it is considered that the greater the proportion of female employees in the organisation, the greater the need for WLB policies (Bardoel et al., 1999).

### **1.5.6 Firm performance**

According to the 2007 WLB benchmarking survey carried out across 284 organisations in Australia, the availability of policies was associated with organisational performance (Holmes, 2007). In a similar way, a number of studies have demonstrated that WLB practices improve organisational performance through reduced overheads in the case of employees working from home, improved productivity among employees working at their peak hours, or social exchange processes arising from perceptions of organisational support (Allen, 2001; Apgar, 1998). Due to these economic factors, most employers have been compelled to engage in WLB initiatives.

The interference between work and non-work responsibilities has a number of negative outcomes including lower levels of job satisfaction and organisational commitment, reduced work effort and performance, and increased absenteeism and turnover (Greenhaus, Collins, Singh, & Parasuraman, 1997). Further support for the influence of WLB practices is generated by the results of organisation level research; for example, Shepard et al. (1996) collected information from 36 pharmaceutical companies in the U.S., covering an 11-year period, in which the implementation of flexible work hours increased the firms' productivity by approximately 10%. These results could be explained through Pfeffer's (1981) symbolic action perspective, which suggests that the provision of WLB policies encourages employee obligation and interest in organisations by serving as symbols of special treatment and organisational concern for workers.

Alternatively, these results could be indicating causality issues at play regarding the results of Perry-Smith and Blum's (2000) and Dex et al.'s (2001) cross-sectional analyses, whereby it was found that successful firms may be better able to afford work-life practices and therefore more likely to make them available. Meyer, Mukerjee and Sestero (2001), in their study of the best 100 companies for working mothers, revealed that organisations offering work-life balance practices enjoyed increased profit rates. Nonetheless, without longitudinal research, it is impossible to ascertain whether work-life practices contribute to organisational performance, or whether organisational performance contributes to the existence of work-life practices. It is for this reason that this research study is analysing organisations from 1998 to 2008.

Research on these factors (that influence the nature and extent of WLB policies) have been dominant outside New Zealand, in particular the United States or UK, a research gap this study attempts to address. Insights into the factors that influence the inclusion of WLB provisions in New Zealand industries should inform public policy as well as employer and union strategy. Additionally, this will provide indicators as to why there are variations across organisations in the implementation of WLB programmes, thereby informing the government where the demand for WLB is greatest and, in turn, indicating whether legislating for such change is warranted. This aim will be achieved by analysing the inclusion of policies within negotiated collective employment agreements.

## **Chapter Two: The New Zealand Context**

In New Zealand, as elsewhere, the concept of WLB is never far from the public discourse. The concept emerged from work-family or family-friendly initiatives under the emblem of equal employment opportunities (EEO) (Waring & Fouche, 2007). EEO was about women, Maori, Pacific Island people, people from ethnic minorities and people with disabilities. Some of the issues that women faced include balancing work and family responsibilities. However, as the demand for more hours at work grew, coupled with an increase in men getting more involved in social responsibility issues, the phenomenon of WLB emerged. The implementation of WLB policies was meant to benefit not only women, but also men and other employees.

### ***2.0 Current Issues***

To provide a snapshot of the New Zealand context, this section provides a brief overview of the workplace environment, including the predominance of small and medium enterprises, the issues of productivity, skills shortages, increasing participation and population changes, and what these entail for employers and employees dealing with work-life balance issues and caring responsibilities. The outline will also highlight the government initiatives designed to address workplace issues, including regulation and its influence on WLB matters.

#### **2.0.1 Long hours and productivity**

Several factors contribute to an increase in conflict between work and family. Pertinent within New Zealand is the culture of working long hours. Despite the fact that shift work and rotating hours have a negative impact on workers, some New Zealand workers still do extra unpaid hours to get their jobs done, leaving less scope for quality family time (Beaumont, 2003). This trend is often evident among low paid employees, who need to work long hours to earn enough to support families, or the higher paid who may feel compelled to work more hours than they can take. The 2006 census figures showed that high proportions of New Zealanders were working more than 50 hours per week – 40% had variable work hours, 18% were on shift work, and about 25% worked some night hours (Fursman, 2008).

According to the Household Labour Force Survey (HLFS) results for the June 2010 quarter, despite employment falling over the quarter, hours worked continued to increase. This trend indicates that employers are focusing on extending existing staff hours rather than employing more staff to keep up with increased demand. For example, total hours worked rose by 0.6% over the June 2010 quarter, following an increase of 1.3% in the March 2010 quarter (Department of Labour, 2010b). Unfortunately, the increase in the total number of hours worked has added more strain to employees trying to juggle responsibilities between work and life interface. The ultimate result being increased turnover intentions, (Haar, 2004).

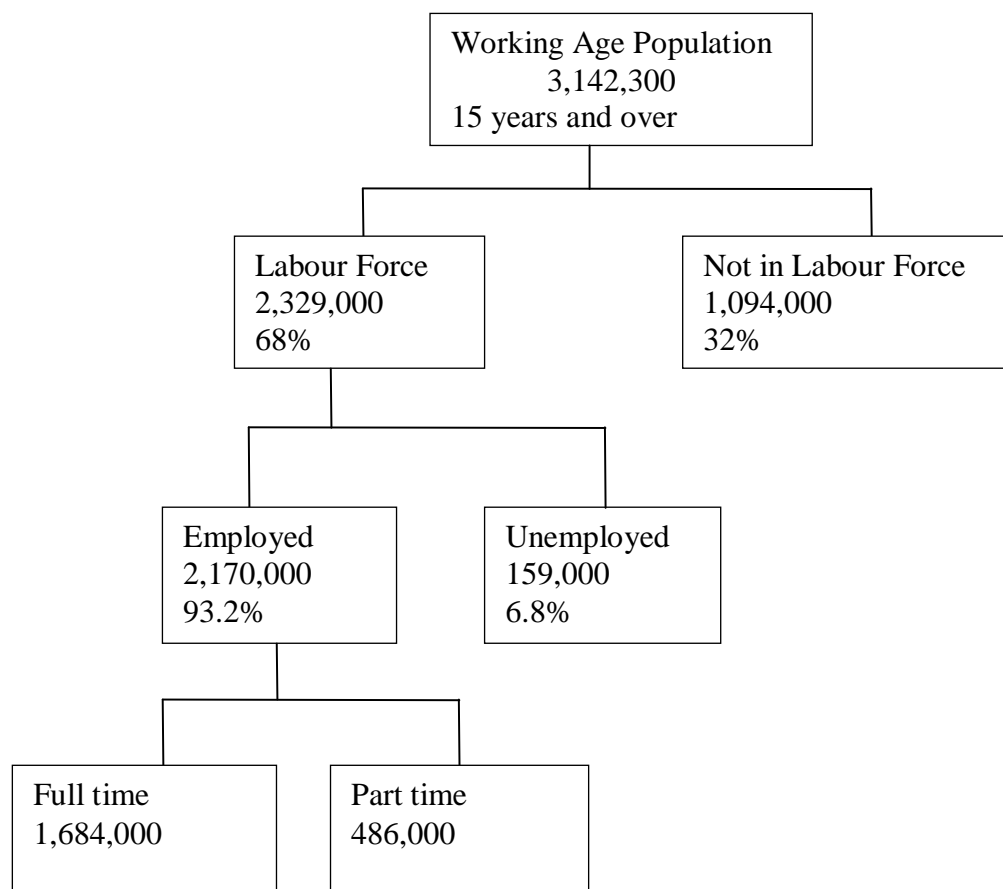
While a large proportion of New Zealand's recent economic growth has been driven by increases in labour utilisation, it is not a sustainable source of long-run growth. According to the report by the Department of Labour (2008a), New Zealand is nearing the limit to which economic growth can be driven by increased labour participation; hence, there is need to initiate future growth through increases in productivity. The problem of low productivity levels has been an issue since the 1970s when annual labour productivity growth was close to zero. Despite rising slightly by 1.5%, in 2006, New Zealand's level of labour productivity ranked 22nd out of 30 nations in the OECD – around 25% below the OECD average, 30% below Australia's level, and 44% below the United States' labour productivity.

Issues of productivity are among the primary drivers as to why the government is focusing more on improving workplaces, with WLB being one of the strategies. The report to the Department of Labour by Ryan (2007) highlights three central components of workplace improvement. Firstly, there is need to recognise value through ensuring that jobs are appropriately and equitably valued according to the skills and competencies required and is gender neutral. The second critical issue is raising the value, which includes the seven drivers of productivity, such as work organisation, innovation and high performing workplace cultures, up-skilling, and enhancing participation. Finally, there is the focus on rewarding value, which entails effective organisational systems for measuring performance and rewarding staff with mechanisms for individual and collective bargaining.

## 2.0.2 High employment growth and low unemployment

Over the past two decades, New Zealand's labour market has been strong and tight, with high employment growth and falling unemployment. Indicators from Statistics New Zealand shown in the Household Labour Force Survey (HLFS) results for the March 2011 quarter demonstrated that employment had increased by 30000 to 2214000, decreasing unemployment by to 2000 to 155000strong annual employment growth to 1.8% in the year to March 2011, up from 1.6% in the year to September 2007. Despite the economic downturn, the unemployment rate has slightly decreased by 6.6% over the March quarter. The HLFS 2010 report suggest that the unemployment rate was driven by a rise in male unemployment (up 21.2% or 15,000 people), while female unemployment rose at a slightly lower rate (up 6.4% or 4,000). Nevertheless, by international standards, the labour participation rates in New Zealand are fairly high (68%). See the labour market summary in Figure 2.1

Figure 2.1:New Zealand Labour Market Participation



Source: Statistics New Zealand

### **2.0.3 Skill shortages**

The New Zealand labour market has been entrenched in skills shortages for a number of years. Despite a decrease in staffing levels reported in the 2009 Quarterly Survey of Business Opinion (QSBO), firms are continuing to report significant difficulty in finding the skills and experience that they require of their employees (NZ Institute of Economic Research Inc., 2010). The skill shortage indicators from the September 2010 quarter QSBO show that a net 40% of firms were experiencing difficulty in recruiting the right people with the right skills for growth opportunity.

Labour shortage in New Zealand is reported as the main constraint not only to individual business productivity, but also to the national economy. This problem is further compounded by the increased demand for skilled labour being felt internationally at the very time when both skilled and unskilled labour has become more geographically mobile. As a result, encouraging women into the labour force becomes an important issue. In a study in Britain, Hurrell et al (2007) discovered that more women would be encouraged back into the workforce if flexible working were available.

### **2.0.4 Female labour participation rate**

The economic growth and increased flexibility in the labour market continue to attract an increase in women's labour market participation. Despite the female participation being lower (61.9%) than their male counterparts (75.6%), the female participation, however, has increased more rapidly than male participation, so the gap was smaller in December 2007 than it was at any other time since the HLFS began in 1986 (Statistics New Zealand, 2009a).

Female labour force participation rates are markedly lower than male rates for those aged 25–39. This is to an extent attributed to domestic responsibilities of caring for children, since there is a considerable increase in labour market participation for women aged over 40. In the same context, relative to men, female employees are more likely to be engaged in part-time work and, as suggested above, they work fewer hours in order to accommodate domestic responsibilities (McPherson, 2009).

### 2.0.5 Business demographics

The New Zealand business sector is markedly defined by small businesses. In 2006, 96% of all businesses in New Zealand employed 19 or fewer people, so were classified as small and medium sized enterprises (Department of Labour, 2008a). In terms of employment, 87% of all businesses employed five or fewer people, and 64% of enterprises had no employees. As at February 2009, 69% (327,800) of all enterprises were non-employing and 28% of them were predominantly involved in rental, hiring, and real estate services, 16% in agriculture, forestry, and fishing, and 11% in professional, scientific, and technical services (Statistics New Zealand, 2009c). The largest decrease in employment figures in February 2009 came from businesses with 20–49 employees (down 14,800 employees or 5.5%), followed by enterprises with 100 or more employees (down 13,700 employees or 1.5%).

*Single-parent families:* Similar to other parts of the world, there is growing evidence to suggest that the topic of WLB is also becoming a central subject for men (Burke, 2000), not only because of the changing structure of New Zealand families, but because the number of single-parent families is rising, and more men are becoming sole parents or primary caregivers (Smith & Gardner, 2007). According to Statistics New Zealand, in 2009, single parent families made up 29 % of families with children under 18. In the same way, there is an increase in the participation rates of working women and working mothers, rising numbers of dual-career couples and enlargement in the elderly population (Haar, 2008).

*Dual career couples:* The rising number of dual-career couples (that is, as two people who have a shared relationship, cohabit and each have a career) is also another factor that is facilitating the emergence of WLB in New Zealand. This demographic change is driven by such factors as globalisation, technological changes and the increasing variety of non-traditional family structures in society. The dual-career phenomenon has become increasingly prevalent, not only in New Zealand, but worldwide. However, this way of life often generates stresses and strains, at home and at work, for couples juggling multiple demands, which in turn can have negative consequences for organisations. To counteract these effects, New Zealand researchers O'Driscoll and Bough (2007) recommended that organisations design policies aimed at reducing the work-family interface.



*The ageing population:* There is a challenge in most organisations to overcome severe shortages in some areas, combined with an increasingly ageing population. It is projected that, by 2012, New Zealand is likely to have a higher proportion of workers aged over 55 (21%) (McPherson, 2009). As a result, a dramatic shift is forecast to occur with the median age of the working population, increasing from 35 years of age now to a projected 45 years of age by 2051. The workforce is growing collectively older, and the government and employers need to not only to adjust itself to that trend but also to initiate strategies that will alleviate the dilemma of skills shortages as the current active population retires. Upon retiring the ageing workforce depart with valuable experience and skills that could otherwise continue to benefit the economy. A decrease in the number of workforce participation places pressure on those remaining in the labour market to provide goods, services and tax revenue to support a more dependent population.

In an effort to alleviate some of these problems, novel ideas are being unleashed through human resources management practices, such as the implementation of phased retirement arrangements. Essentially, these initiatives are implemented as WLB policies in an attempt to capture the qualities that older people bring to work - good value, reliability, experience and maturity. According to a review of the 1991-2006 Census returns by researchers at the Equal Employment Opportunities Trust, released in July 2009, the number of people aged 70+ doing paid work almost tripled during this period, and those in paid work aged 60-69 more than doubled.

The figures from Statistics New Zealand (2010) indicate that older workers are increasingly continuing to participate in the labour market. For example, in 2006/07 the number of older people employed grew by 5.9%, with their labour force participation rate in 2007 at 40.7%, up from 39.7% in 2006. This leaves New Zealand near the top of the OECD in rates of workforce participation among older people.

In the same context, New Zealand faces a declining birth rate (low fertility) and lengthening life expectancy (Macdonald & Kippen, 2004). The total fertility rate of 2.0 is slightly below the replacement level of 2.1; hence, the New Zealand population is forecast to drop to 0.8% a year by 2011, slowing to almost zero by 2051 (Department of Labour, 2008a). Consequently, these demographic trends pose a threat to the working population as a whole at the same time that the older working population is expanding.

All these factors indicate how critical the issues of WLB have become. Even though the issues and desirable solutions may vary in character and nature, the debate on WLB reveals how crucial it is for employees in all types of work, at all levels of the organisation and in all kinds of organisations (Department of Labour, 2008b). It is as critical to the person in the maintenance crew as it is to the senior manager, the person in the bakery or in a government department. The concept of WLB has emerged not only as a business matter but also as a concern for the government and the majority of workers, the more so because of the assumed benefits that work–life balance may provide (Ravenswood, 2008), which include retention, commitment and productivity (Greenhaus & Powell, 2006).

Both employers and employees have embraced the emergence of WLB initiatives (Hasluck, Hogarth, & Pierre, 2003), yet there are indications that the implementation of such provision remains inconsistent and often constrained (Crompton, Dennett, & Wigfield, 2002). Furthermore, there is an absence of current and historical information on whether and why employers adopt, or indeed exceed, legal and policy minima in their negotiated initiatives. By providing WLB policies, employers are indicating their willingness to provide an organisational environment where the work–life conflict issues can be addressed.

This research will attempt to contribute to the WLB literature by examining a number of salient factors that shape the inclusion of WLB policies in CEAs. The New Zealand context is more particularly suitable for this study, since work–life programmes are a more recent phenomenon here than in the United States. Additionally, countries such as New Zealand and Australia are very much under-represented in the WLB literature (Elloy, 2001) and, according to Haar (2001); researching such countries can enhance the internationalisation of the WLB literature.

## ***2.1 The New Zealand approach***

Over the past two decades, the New Zealand government has committed significant political and financial resources to WLB (Mason & Waring, 2007), underscored by the need to increase New Zealand employees' wellness and organisational commitment, engagement and productivity. Together, these augment the international competitiveness of New Zealand businesses, particularly in relation to their Australian counterparts (Durrant, 2009). Nevertheless, in some cases, this effort has been hindered by the lack of extant knowledge as to why there is inconsistency in the nature and extent of not only government-influenced WLB policies, but also of collectively-negotiated provisions across New Zealand industries (Equal Employment Opportunity Trust, 2007).

The New Zealand government has adopted both the economic and societal perspectives on WLB, taking a key role in promoting the significance of work–life issues at the highest levels of government (Todd, 2004). The initial commitment to WLB was set out in the 2002 Speech from the Throne, which stated that work is only one dimension of living, and it should not crowd out and distort family life, recreation and personal development (Wilson, 2003). The Speech also highlighted that WLB initiatives should contribute to the government's goals of a growing economy and an innovative and inclusive society. In 2003, the New Zealand Government established the Work–life Balance Programme to facilitate an integrated and coordinated programme of policy, practice and research to promote better balance between paid work and life outside of work.

This perspective is driven by an interest in encouraging positive changes in workplace practices as a motive for improving workplace productivity and consequently stimulating economic growth. Much of the policy investment in this area has been focused on drivers of productivity, including improving New Zealanders' WLB and ensuring that people with family and caring responsibilities are supported to participate in the labour market, if and when they choose (Department of Labour, 2008a). In this context, WLB is a means of achieving both social outcomes (by enabling people to do what they want with their lives and enhancing the well-being of themselves, their families and communities) and economic outcomes (by enhancing firm productivity).

The government collects and disseminates information on WLB. Various resources on WLB are available through the New Zealand Department of Labour's Future of Work Programme, which includes a website that provides a wide range of information on best practices, recent research, and examples of provisions in collective agreements related to work–life balance, and links to relevant government policies and legislation. Additionally, the government, through New Zealand's Equal Employment Opportunities Trust, recognises and rewards organisations with best practices in WLB (National Equal Opportunities Network, 2010). Even though none of these practices are mandated, they serve as initiatives geared towards encouraging organisations to participate in WLB policy implementation.

### **2.1.1 Legislation**

The policy concern for WLB by the New Zealand Labour-led government came from a gradual recognition and response to over-committed citizens - people who have too much to do in too little time. This led the government to make several changes in employment legislation. To this end, WLB policies are designed to address difficulties that people are now having in fulfilling both their work and life commitments, be they the care of children, elderly relatives, studies, domestic duties, community obligations, or religious responsibilities (Department of Labour, 2008).

The main focus of these initiatives is to increase overall productivity and promote labour force participation rates by encouraging parents into paid work, with more government support available for working families. It also recognises the increase in dual career families and the costs associated with the return to work, such as childcare (Hall & Liddicoat, 2005). Table 2.1 outlines the legislative changes that have been implemented in support for WLB.

**Table 2.1: Summary of policy and legislation pertaining to WLB**

Date	Title of Act/ policy	Key points
1992	Health and Safety in Employment Act 1992	Holds employers responsible for controlling or eliminating hazards that may cause injury or occupational illness, to implicitly include work-related stress.
2002	Parental Leave and Employment Protection (Paid Parental Leave) Amendment Act 2002	To include 12-week government payment for eligible employees. Leave under the act falls into 4 types: maternity leave of up to 14 weeks, paternity/partners' leave (unpaid) of up to 2 weeks, extended unpaid leave. Total amount of leave between two parents is 52 weeks.
2004	Parental Leave and Employment Protection Amendment Act 2004	Period for above payments extended to 13 weeks. Eligibility for leave changed to <i>average</i> of 10 hours per week from the <i>minimum</i> of 10 hours per week immediately preceding 6 or 12-month period.
2005	Working for families	Financial package offering combinations of housing assistance, childcare subsidies and tax credits for working families.
2005	Parental Leave and Employment Protection Amendment Act 2004	Period for paid parental leave payments extended to 14 weeks.
2006	Parental Leave and Employment Protection Amendment Act 2004	Amended to include paid parental leave for those who are self-employed.
2007	Employment Relations (Flexible Working Arrangements) Amendment Act 2007	Employees who are responsible for the care of any person has right to request flexible working practices (hours, days or place of work).
2007	20 hours' free child care	Up to 20 hours' free child care for 3- and 4-year-olds at eligible early childhood centres.
2008	Employment Relations (Breaks, Infant Feeding, and Other Matters) Amendment Act 2008	Required designated facilities and breaks for employees who wish to breastfeed in the workplace or during work periods. Employees provided with rest and meal breaks.

Source: (Ravenswood, 2008)

As shown in Table 2.1, there are four major legislative changes intended to improve the well-being of employees. These are Health and Safety in Employment Act 1992, Parental Leave and Employment Protection Amendment Act 2002; 2004; 2005; 2006, Employment Relations (Flexible Working Arrangements) Amendment Act 2007 and Employment Relations (Breaks, Infant Feeding, and Other Matters) Amendment Act 2008.

### **2.1.2 Health and Safety in Employment Act 1992**

The Act was enacted to secure the inclusion of stress and fatigue as official workplace hazards, encouraging New Zealand businesses to actively manage issues of health and safety. The effective management of stress in the workplace requires employers and employees to work together to develop systems and frameworks for managing hazards. As reiterated by the Minister of Labour, Margaret Wilson, the Act rebalanced the roles of employers and employees in providing a safe and healthy workplace. Whilst employers must provide a healthy and safe workplace, employees have a role to play, which includes ensuring their own health and safety, at the same time having an input into health and safety at work.

Addressing stress and fatigue issues is an effective way of improving people's ability to achieve a satisfactory WLB. Poorly designed shifts or rosters, poorly distributed work, and poorly designed jobs typically lead to high stress levels and burnout. Hence, the health and safety legislation has enabled employees, either as individuals or through trade unions, to have a voice on issues pertaining to working conditions, such as hours of work and the type of work.

### **2.1.3 Parental Leave and Employment Protection Amendment Act 2002**

The Parental Leave and Employment Protection Act 2002, which was amended in 2004, 2005 and 2006, prescribes parental leave entitlements for female and male employees, protecting the rights of employees during pregnancy and parental leave. The Parental Leave and Employment Protection (Paid Parental leave) Amendment Act 2002 and the 2004 amendment provide eligible employees with some parental leave payments of up to 14 weeks, which may be shared by both parents and is available to adoptive parents.

The Parental Leave and Employment Protection (Paid Parental Leave) Amendment Act 2002 stipulates that, even though the mother is primarily eligible for parental leave and payment, she may choose to transfer some or all of her entitlement to her spouse (who may be a same-sex partner). This legislative change is significant, as it makes tax funded paid leave available to all eligible New Zealand employees irrespective of whether or not the organisation has WLB policies.

#### **2.1.4 Employment Relations (Flexible Working Arrangements) Amendment Act 2007**

Flexible work legislation allows employees with children under five or with disabled children the right to request changes to their working hours. The Act is a departure from other legislation and follows the WLB discourse of being gender neutral and open to all (Lewis, Gambles & Rapoport 2007), as it entitles working parents with children the right to request changes to how they work. This encourages employees to challenge currently accepted modes of work, acknowledging that, particularly for parents, the ‘traditional’ way work is carried out is unsatisfactory.

#### **2.1.5 Employment Relations (Breaks, Infant Feeding, and Other Matters) Amendment Act 2008.**

In April 2008, the New Zealand Government enacted the Employment Relations (Breaks and Infant Feeding) Amendment Act, which requires employers to provide facilities and breaks for employees who wish to breastfeed and to provide employees with rest and meal breaks. The main objective of this Act, apart from the provision of rest and meal breaks, is to create minimum standards for a modern workforce in respect of the protection and promotion of infant feeding through breastfeeding. The legislation supports government policy concerning the choices of employees, particularly regarding their WLB and caring responsibilities.

## ***2.2 The impact of legislation***

Legislation is helpful, but not absolute, as can it only provide basic protection of employment rights, setting minimum requirements. Even though there is no legislative reason to prevent an employer providing leave or payments in excess of the law, research discovered that legislation only motivates employers to provide the minimum requirements and nothing further (Burgess, Henderson & Strachan 2007). Hence, apart from campaigning and bargaining on WLB issues, trade union lobbying on improved legislation and implementation might be expected to help improve employee well being.

As such, it has introduced greater annual leave entitlements and paid parental leave. Under this motive, in 2000 the government introduced the Employment Relations Act, replacing the Employment Contracts Act, which had been in place since 1991. The centrality of the Employment Relations Act 2000 is defined by the encouragement on collective bargaining to redress the imbalance of power in the employment relationship. It also recognizes the need for legislative guidelines, such as Good Faith Bargaining. It is a concept that is central to the Act, and it requires honest and open communication between parties to the employment relationship, promoting mutual obligations of trust and confidence between the employers and the employees (Department of Labour, 2008b).

The Employment Relations (Flexible Working Arrangements) Amendment Act 2007 allows employees with caring responsibilities, including caring for the sick, disabled, elderly or children under the age of 5 years the right to request changes to their working hours. Additionally, the employees have to indicate what sort of changes they want to make, provide information on how this might impact their work and suggest solutions to mitigate any negative impact. The Employment Relations Act 2007 allows for an employee to request changes to working conditions or an agreement, which the employer must consider and respond to. However, there is no requirement for the employer to agree to the changes in conditions or agreement. This legislation will be analysed in relation to the impact on WLB provisions in 2008.



## **2.3 Collective bargaining in New Zealand**

It is important to analyse the influence of collective bargaining in light of WLB issues. Collective bargaining serves the purpose of communicating the needs of workers and their employers on issues of wages, hours of work, rules, and working conditions. Hence, in a way, the right to bargain collectively provides workers with a voice that enhances human dignity, liberty and autonomy, giving them the opportunity to influence the establishment of workplace rules that control a major aspect of their lives

Over the past four decades, New Zealand has followed a unique pattern in its industrial relations system, which has defined a distinct approach to the nature and character of collective bargaining. Since 1894, the predominant system was one of compulsorily conciliated bargaining for blanket-coverage awards, supported by the availability of arbitration award system. The awards ranged from local industry labour markets to awards that were regional or national in scope. Predominantly, awards were negotiated by a limited number of representatives, comprising employers and employees and their respective organisations.

The pattern of bargaining involved the process of "the annual award round", in which the relatively few negotiated documents represented the relative many in a conciliated setting, with contingent arbitration in the background. However, there were a few industries in which second-tier negotiations were applied for above-award rates. The legislative reforms in the 1980s, in particular the State Sector Act of 1988, were intended to stimulate enterprise-based collective bargaining and to change the nature of collective bargaining in this country. This resulted in more collective bargaining occurring.

This experience was short lived, up to the enactment of *The Employment Contracts Act of 1991*, which, on the contrary, promoted individualism in employment relationships at the expense of collectivism, causing union membership and the coverage of collectively negotiated documents to decline dramatically. Taking another twist, the *Employment Relations Act 2000* reversed the legislative philosophy that had dominated the 1990s, giving encouragement to union membership and promoting collective bargaining as a positive basis for employment relationships.

As part of collective bargaining, the obligation to bargain in good faith was included in the Act to give further substance to bargaining in the new environment. The Act included the engagement of the mediation services in employment disputes. Hence, instead of the relying on the arbitration system, the new Mediation Service was encouraged to be involved, both reactively and proactively, in assisting the parties in collective bargaining and any other employment disputes.

### **2.3.1 Conclusion**

This chapter reviewed the New Zealand context, providing a brief overview of the workplace environment, including the predominance of small and medium enterprises, the issues of productivity, skills shortages, increasing participation and population changes, and what these entail for employers and employees dealing with work–life balance issues and caring responsibilities. The section also looked at how legislation had impacted on issues pertaining to WLB. The Government has signalled that WLB is an increasingly significant employment relations issue for all of New Zealand society, as well as for the economy. It has stated that it has a leadership role in promoting policies that balance work and life, hence, has promoted it through such projects as the Work–life Balance Project in 2003. Secondly, the role of the New Zealand government of WLB issues is evident through legislation. Of particular interest in this research is the impact of the Employment Relations Act 2000, relative to the Employment Contracts Act 1991. Also, a further analysis will be made on changes that the Employment Relations (Workplace Arrangements) Amendment Act 2007.

## **Chapter Three: Methodology**

### ***3.0 Aims of the research***

This research is intended to identify factors that influence the nature and inclusion of work–life balance (WLB) policies within collective employment agreements (CEAs) of New Zealand organisations. In total, 28 industry sectors in New Zealand participated in this research study. The choice of a diverse range of industries for study provides an opportunity to consider and evaluate the various trends of WLB policy implementation. Additionally, covering a broader occupational base is crucial in developing typologies that reflect the kind of structural constraints existing in different industries. As Roberts (2007) suggests, occupations do not face exactly the same problems; hence, they have unequal access to coping strategies. This suggests that WLB issues, although felt at all levels, are class-related in terms of the character of the problems and the availability of coping strategies. Findings from this research study will serve the purpose of informing government and workplace policy recommendations and serve to highlight the significance of improving the institutional environment as a strategy to advance the provision and uptake of policies and, hence, the improvement of employee well-being.

Using mixed data collection methods, the first stage involved carrying out an analysis on CEAs housed within the Industrial Relations Centre at Victoria University of Wellington. These data were used to develop a comprehensive coding typology of WLB provisions found in both collective employment contracts (CEC) and CEAs. In the second stage, using the Survey Monkey software, survey questionnaires were administered to all organisations that participated in the research. The main focus in employing this approach was to identify the existence of any WLB policy outside those included in the CEA. This information was critical to the research objectives, as it offer insights into the extent to which companies have shifted beyond the statutory minimum for WLB arrangements and the factors that have prompted them to take these voluntary actions. Only four detailed questions were included in the survey questionnaires (see Appendix 2). Furthermore, the time constraint meant that telephone interviews were conducted with trade union officials, asking the same questions as in the survey questionnaires. The data from the surveys and interviews were quantified to supplement the information that had been obtained from CEAs and CECs.

The study covers a period of a decade, from 1998 to 2008. This period was chosen specifically in order to enable a comparison of WLB initiatives under quite different social policy, political, economic – and indeed, bargaining – arrangements (Deeks, et al., 1994; Rasmussen, 2009). Secondly, it is within this period that two major legislative reforms were made – the Employment Contracts Act 1991 (ECA) and the Employment Relations Act 2000 (ERA). The ERA was enacted on 2 October 2000 and repealed the ECA. The ECA adopted a classical contractual approach to the employment relationship and was based on the assumption that employers and employees had equal bargaining power. On the contrary, the predominant view on ECA is that it introduced a considerably more orthodox and moderate approach to labour market regulation. As such, it promoted collective bargaining and trade union growth (Rasmussen, 2009).

### **3.0.1 Research Objectives**

The project seeks to compare the nature of negotiated WLB provisions from 1998 to 2008 by:

- a) developing a comprehensive coding typology of collective employment contract (CEC) and collective employment agreement (CEA) provisions that constitute WLB measures;
- b) comparing the scale and character of work–life balance provisions in CECs and CEAs negotiated from 1998 to 2008;
- c) evaluating the implementation of WLB policies within CECs and CEAs negotiated in the period 1998 to 2008;
- d) identifying any differences in nature and character of WLB policies among different industries.

### **3.0.2 Research Questions**

- Which factors affect the nature and inclusion of WLB within CEAs?
- Which factors are the most crucial? Why?
- Which policies are the most prominent?
- Are there any differences between industries?
- What is the role of trade unions and collective bargaining on issues concerning WLB?
- What differences exist between government and private organisations on the provision of WLB policies?

Indeed, an emphasis on the understanding of the factors that shape the nature and extent of WLB arrangements through the use of negotiated WLB initiatives is likely to yield positive changes in employee well-being and workplace performance (Brough, Holt, Bauld, Biggs, & Ryan, 2008). The study will thus seek to build on existing policy recommendations such as those posed by the Families Commission (2007), whose research with New Zealand families found that, although recent changes to legislation have brought about improvements, there are other factors, both social and economic, that require attention in the implementation of WLB policies.

### **3.1 Research design**

The research used the mixed methodology approach, because of its capacity to respond to the proposed research aims and enable the comparison of facts and data in determining which factors affect the nature and inclusion of WLB policies within CEAs. Therefore, apart from applying quantitative methods using the historic data housed within the Industrial Relations Centre, the interviews, design and implementation of the coding scheme represent a qualitative aspect to the study.

### **3.1.1 Research Sample**

A sample of 100 organisations was selected from the Victoria University Industrial Relations (IRC) database (see the IRC overview, below). All organisations were from New Zealand and covered various industries including manufacturing; mining and related services; finance, insurance and business services; education; agriculture, fishing and forestry; transport, storage and communication, retail, wholesale, restaurants and hotels; government administration and defense services; construction and building services, energy and utility services; health and community services; sport and recreation. The sample was selected from the population of organisations that have been submitting collective employment agreements/contracts to the IRC since 1998. This process was carried out in order to identify those organisations whose CEAs cover WLB policies, as this was crucial in meeting the requirements of the research. According to the Employment Relations Act 2000, collective employment agreements are bargained between employers and trade unions. The March 2009 Household Labour Force Survey indicated that, as at 1 March 2009, there were 159 registered unions with a total membership of 387,959, representing 17.9% of the total employed labour force and 21.5% of wage/salary earners for that period (Statistics New Zealand, 2009b). The 10 largest unions account for 76.4% of the total union membership, and more women (59.9%) than men are union members.

To obtain financial information on organizations involved in this research, published annual reports for the period 1998 to 2008 were sought. This information was merged with the details of the organisations contained in the Company Research database. This portal, previously known as NZX Deep Archive, offers information about public companies, including investment profiles, trading summaries, tearsheets, index constituents, adjusted share prices, charts, event- and price-sensitive announcements, and substantial shareholder data. Since it was crucial to obtain comparable financial information, about 3% of the organisations were omitted during this process, as there was no access to their annual reports, nor were they listed in the Company Research database. Despite this limitation, the sample size remains a significant representation of the population of organisations across New Zealand.

### 3.1.2 Victoria University of Wellington (IRC)

The Industrial Relations Centre (IRC) at Victoria University has continued its work, begun under the Employment Contracts Act 1991, of documenting the structure and content of collective bargaining agreements. This information has been crucial to employers and unions in promoting understanding of the strategies and processes of collective bargaining. However, there has been no real research attention paid to the influence of collective bargaining on issues pertaining to WLB.

The Victoria University of Wellington IRC houses a nationally- and industry-representative database on CEAs. The Centre was established in 1970 to provide a forum for research into industrial relations, human resource management, labour markets and any area related to employment relations. Every year, IRC holds employment agreement seminars around the country to report to practitioners on wages and conditions contained in the Industrial Relations Centre's comprehensive database of Collective Employment Contracts and Agreements. In addition, the *Employment Agreements: Bargaining Trends & Employment Law Updates* are published annually to provide enlightenment on the current discussion and debate on industrial relations matters – in particular, the changing environment in New Zealand labour relations.

Since 1984, the IRC has surveyed New Zealand employers and trade unions, requesting copies of employment contracts/agreements that have been collectively negotiated. Subsequently, as the term of the agreement expires, supplying parties are contacted to provide a copy of the renegotiated contracts/agreements. This process is followed to ensure that a longitudinal data series is maintained, from which changes in the outcomes of collective bargaining are identified.

Collective employment agreements or contracts are submitted on a voluntary basis, which tends to exclude some organisations. However, the samples surveyed include most employees covered by collective agreements in New Zealand since 1991. Since all trade unions are registered, the annual union membership report of the Registrar of Trade Unions serves as check on how closely the coverage estimated from the IRC database matches that which would be expected, given the number of members of registered unions. The Employment Relations Act 2003 stipulates that only registered trade unions are permitted to negotiate employment agreements on behalf of a group of employees.

The Centre has been reporting data on WLB since 2005. Some of the provisions that have been examined include change of work status (for example, between full-time and part-time), working flexible hours, job-sharing, working from home, tele-work, and extended unpaid leave. These data are reported at industry level and in accordance with the Australia New Zealand Standard Industrial Classification (ANZSIC) system.

The IRC focuses on analysing data from collective agreements only, and this tends to exclude the vast number of individual employment arrangements throughout the country. Nonetheless, the trends that the Centre report are very representative of collective agreements and quite representative of individual agreements, because of the impact of collective bargaining 'reach' or 'influence'. These are terms used to describe the passing on of terms from the collective agreement to non-union employees. Organisations with a high union density or high skills demand are often more inclined to adopt collective agreement terms in order to attract or retain staff.

Secondly, there is another bias: coverage by collective agreements is more prominent in the public sector, and as such the private sector seems to be excluded from the analysis. For example, in 2009, 49% of public sector workers were on collective agreements, in comparison to only 9% of private sector employees. However, this weakness can be discounted by the fact that employment in the public sector is considerably more than in the private sector (IRC, 2009). Hence, in terms of the number of employees covered by collective agreements, there is not much difference.



## **3.2 Data collection and preparation**

### **3.2.1 Quantitative fieldwork**

Quantitative data were generated from the numeric coding of WLB policies in CEAs for unionised employees in New Zealand industrial sectors. These data were generated from IRC and used to respond to aims and objectives of the study. The codes used by the researchers drew on pre-existing categories outlined in the IRC's existing coding manual for CEAs, which include flexible working arrangements, job-sharing, work-at-home programmes, top-up re-entry provisions, special leave, top-up bereavement leave and top-up paternity leave. New categories emerged from the CEA 'data' examined by the researcher. This was particularly evident in provisions that had not been coded previously, such as subsidised exercise or fitness centres and phased retirement. These two policies were included on the basis that, in addition to the development of public policies that supports responsibilities outside of paid employment; organisations have increasingly been developing formal policies outside of CEAs in an attempt to enhance the WLB nexus.

### **3.2.2 Survey Questionnaires**

Short online survey questionnaires were designed and administered to human resources (HR) managers in each participating organisation. The aim of carrying out this survey was to ascertain the extension of WLB policies outside those provided in the CEAs. Secondly, the exercise facilitated the identification of the rationale that drive the extension of policies, whether labour market competition, increase in women participation or management benevolence. The three factors analysed have been proved in previous studies as the most significant in the implementation of WLB initiatives (Bloom, Kretschmer & Reenen, 2006; Department of Labour, 2006; McDonald, Young & Grant, 2008).

Survey Monkey, a free online survey software and questionnaire tool, was used to send the surveys and collect the data. This process of data collection was employed because of its strength in providing a fast response rate, thus mitigating time constraints. However, there was a poor response (25%) due to the nature of HR managers' jobs, particularly the fact that they are invariably working to a hectic schedule.

Secondly, the lack of response was intensified by the spam filters established in most companies' email servers to capture any spamware. As a result, most survey emails were traced as spam. To address this problem, follow-up calls were made to the participating organisations. However, during that process the researcher discovered that some organisations were not willing to participate, on the grounds that they felt the topic was too sensitive; hence, it could trigger employment relations issues. In total, 25% of the organisations responded, covering different industries.

### **3.2.3 Structured interviews with trade union officials**

To further explore the existence of WLB policies outside the CEAs, trade union officials were interviewed for the survey via telephone. Only trade union officials for the employees of participating organisations were included in the interviews. Applying the phone interview method, the same questions used in the employer survey questionnaires were utilised to get trade union responses. This approach was taken strategically to obtain specific data that could be quantified. The main aim was to establish union strategies and effectiveness in including WLB agenda in collective bargaining. It was also designed to measure the amount of bargaining and the conditions under which union bargainers pursue, or fail to pursue, WLB. There were slight differences in the roles of the union officers: this was partly contributed to by variations in organisational size and structure and the pattern of industrial relations existing in different industries.

Appendix 4 details the interview guide that was used to collect a range of detailed WLB policies provided outside the collective agreement. Three types of key data were collected: The first was to identify whether the employer (listed in the specific collective agreement) implemented any WLB policy outside of the collective agreement. Secondly, it was critical to know whether the union promoted this policy in collective bargaining before the employer acted unilaterally to implement this policy. Finally, the interview had to confirm the rationale that led the employer to implement this policy. Data obtained from both the survey questionnaires and the interviews were quantified in order to supplement the information obtained from CEAs.

### **3.3 Variables construction and validity**

#### **3.3.1 Independent variables**

Independent (predictor) variables that relate to the adoption of WLB policies were analysed. These include the, percentage industry union density, return on equity (ROE) and total assets, type of industry and ownership type (private or public), percentage female participation rate in the industry, time (1998–2008).

##### *1. Percentage industry union density*

Union density (the proportion of workers that belong to a union in a given economy) is an indication of the strength and potential influence of the labour movement in the implementation of WLB policies. In this research study, union density was measured using percentage union coverage at industry level. The data was obtained from the figures collated by statistics New Zealand. All the organisations representing various industries have been submitting CEAs between the period covered in the study, which is 1998 to 2008.

##### *2. Return on equity and total assets*

Return on equity and total assets were used to measure the organisation's performance, a predictor of work–life balance. A company's return on equity (ROE) ratio provides valuable information to management when making business financial planning decisions, and it indicates the amount of profit a company derives from every dollar of equity (Smith, 2010). In essence, it measures the return the company generates from the investment that share holders make in the company, telling investors how they are performing without relying on management's earnings reports. This shareholder value-oriented framework has generated considerable transformation, not only in the way that performance is measured, but also in the management processes used to plan, operate and control organisations. It is finding use across different industries, including banking, manufacturing and process industries.

In this study, ROE was calculated using two formulas, as shown below, depending on the financial information available in the annual report. To determine patterns in financial performance, data was analysed for each year, per each holding company, from 1998 to 2008. Calculating values in a Holding Company instead of a Group was required, as the focus of analysis was based at firm level and for specific units.

1. Return on Equity (ROE) = net income/total equity

2. Return on Equity (ROE) = (net income/sales) X (sales/assets) X (assets/equity)

While ROE was used to measure profitability, the value of total assets was calculated in order to give an indication of the firm's efficiency in asset/liability management. Also, total assets value provided an indication of the size of the organisation.

As a supplementary measurement of the financial stability of the organisation (McGuire, Sundgren, & Schneeweis, 1988), the total assets value (calculated from the [sum](#) of [current](#) and [long-term assets](#)) were obtained from the published annual reports of each participating organisation or government department for the period 1998 to 2008.

### *3. Type of industry and ownership type*

The type of industry and the ownership for each organisation included in the sample were derived from the information held in the IRC database. In the database there are 28 industries identified as existing within New Zealand; in this research, only 22 were used (see Table 3.1).

**Table 3.1: Types of New Zealand Industry**

1	Agriculture, Fishing and Forestry
2	Mining and Related Services
3	Finance, Insurance and Business Services
4	Manufacturing
5	Energy and Utility Services
6	Construction and Building Services

7	Education
8	Retail, Wholesale, Restaurants and Hotels
9	Transport, storage and communication
10	Personal and other services
11	Government Administration and Defence
12	Health and Community Services
13	Sport and Recreation

Secondly, all organisations were identified as either publicly (0) or privately (1) owned. While ‘public organisation’ refers to a company that is owned and controlled by the government (or local government), ‘private organisation’ refers to any business not owned by the state. It was critical to separate the two types of ownership in order to facilitate the identification of any variance, in terms of WLB policy implementation, between government and private organisations.

#### *4. Number of female employees*

According to Yasbeck (2004), firms with a large proportion of women in their workforce are more likely to provide work–life balance policies. Percentage female participation rate at industry level was used as a proxy for each organisation. The values were obtained from Statistics New Zealand.

#### *5. Implementation rationale*

Implementation rationale refers to the reason why the WLB policy was implemented; this information was obtained through interviews and surveys. Three main factors were identified: increase in women’s participation, management benevolence, and labour market forces/external competition.

#### *6. Year (1998–2008)*

The year variable is referring to the period covered in the study, which is from 1998 to 2008.

### 3.3.2 Dependent variable

The dependent variables used were: WLB provision (policies included within CEAs), WLB policy (policies outside CEAs) and Total WLB (combination of provisions and policies). The policies/provisions analysed include flexi-time (flexible working arrangements), job-sharing, work-at-home programmes, top-up re-entry provisions, phased retirement, special leave, top-up bereavement leave, top-up parental leave and subsidised exercise or fitness centres.

#### 1. *Flexi-time (flexible working arrangements)*

Flexi-time in this study is considered as an arranged agreement between a manager/supervisor and a staff member in which they mutually consent to vary the staff member's commencing, ceasing and meal break times while still maintaining the total number of hours worked over a period. As more people seek employment through less traditional work arrangements, flexibility is becoming a vital WLB provision (Stavrou, Spiliotis, & Charalambous, 2010).

The growing emergence of flexible forms of work that deviate from standard employment contracts is considered necessary for achieving economic growth through the adaptation of business strategies and productivity to globalised markets and economies. It emerges in different forms, such as arrangements to accommodate for changes in the work patterns and schedules on a daily, weekly, or longer period. Flexible work arrangements are not limited, but may include flexitime, tele-work, compressed workweek, part-time, even overtime, shifts, weekends, and contingent work (Stavrou, 2005).

#### 2. *Job-sharing*

Job-sharing is the sharing of one job by two or more employees who each work on a part-time basis, sharing the work, hours, salary and entitlements. A job-sharing arrangement can bring a range of benefits to employers, such as retaining experienced and valued employees; enabling mature-age employees to remain at work rather than retire; attracting a wide pool of applicants for new jobs; bringing two sets of experience and skills to the job and workplace; promoting the organisation as an employer of choice; and making part-time work available while retaining full-time coverage of positions.

A survey undertaken in Dunedin, New Zealand, suggests that job-sharing arrangements emanated from the changes in the labour laws, including the enactment of the State Sector Act 1988 (which requires the state sector to be a “good employer”) and the Employment Contracts Act 1991 (which allows human resource management to focus on alternative work methods) (Hall, 1993). This transformation contributed to the removal of some of the institutional barriers to both the notion and practice of job-sharing in New Zealand.

Job-sharing is meant to cater for employees who have hobbies, professional interests or children to nurture, and find that a 40-hour work week interferes with these activities. In addition, it can help by avoiding the termination of employment. According to the Equal Employment Opportunity (2010), job-sharing is becoming increasingly common in New Zealand as employers respond to employees' needs for different ways of working. A survey carried out by Hudson (2007) suggests that when a job-sharing programme is properly implemented and integrated into an organisation, it contributes significantly to staff recruitment and retention.

### *3. Work-at-home programmes*

Work-at-home programmes entail an agreement that enables employees to work specified hours at home instead of at their usual location. Previous literature suggests that the experience of long hours at work and intense working conditions can have detrimental consequences for workers' health, psychological well-being and family life (Burchell, et al., 1999; Institute of Management, 1995). In a research study conducted by Green (2001), it was noted that today work is more intense than it was a decade ago, with the most notable source of increased effort coming from peer pressure. In the face of this evidence, various organisations are responding by offering the option of working from home as a means of facilitating the combination of employment and other responsibilities.

### *4. Phased retirement*

Phased retirement is a flexible working provision that presents an incentive for ageing employees to prepare for retirement while continuing to contribute to the workforce. Similarly, as New Zealand faces the challenge of an ageing population, organisations are initiating strategies to capture the expertise and experience of the retirees.

According to a nationwide research study by Alpass and Mortimer (2007), by the middle of the 21st century one in four New Zealanders will be aged 65 or older, compared with one in eight today. Additionally, despite an increase in life expectancy (an average of two years per decade), fertility (after a mid-century surge) has fallen by 10%. Consequently, within 10 years the first of the baby-boomers will reach retirement age (Alpass & Mortimer, 2007). Many ageing workers, while still willing to work, may like less conventional part-time and flexible work arrangements, phased retirement, negotiated transitions and newer ways of working. In this context, it is crucial to analyse the provision of phased retirement and measure the extent to which New Zealand firms are reacting to demographic changes.

#### *5. Special leave*

Special leave provisions are designed to enable employees to meet individual needs and responsibilities that cannot be attended to outside of normal working hours, including discretionary leave and jury service.

#### *6. Top-up bereavement leave*

Bereavement leave is paid leave of limited duration granted to an employee upon the death of a member of the employee's immediate family or household. The Holidays Act 2003 provides a minimum entitlement of three days' paid bereavement leave, which can be taken at any time and for any purpose genuinely related to the death of an immediate family member. However, as with parental and re-entry leave, some organisations offer extra days in addition to the legislated period.

#### *7. Top-up parental leave provisions*

Parental leave is an employee benefit that provides paid or unpaid time off work to care for a child or make arrangements for the child's welfare. It includes maternity, paternity, and adoption leave. Parental leave is a particularly contentious area of public policy, as concerns are raised about health protection for mothers in paid work, equal opportunities for female workers, gender equity in the home, access to adequate antenatal and birthing care, and fertility support (Callister & Galtry, 2006).



In the same vein, there are concerns around payment, including whether there should be provision for job protection only or for a period of paid leave; who pays for it; the level of payment, including whether there is a 'cap' on the payment; and the length of the payment period. There are also issues of appropriate eligibility criteria for parental leave, including who is considered to be part of a family. Parental leave policy is significant, not only to families, but also to employers and the wider society.

According to New Zealand legislation, parental leave is given to female employees who are having a baby or to a nominated partner/spouse when assuming the care of a child under six years that they intend to jointly adopt. However, parental leave can be shared between partners and can be extended without leave. In view of the minimum period set under legislation, some organisations may offer top-up parental leave and re-entry as part of the WLB policies.

#### *8. Subsidised exercise or fitness centres*

As the campaign for health and fitness in the work place gains momentum, many companies over the last several decades have taken a proactive approach in implementing worksite health promotion programmes, such as subsidised exercises or fitness centres at the company premises. Anderson and Kaczmarek (2004) argue that historically such programmes have resulted in reduced absenteeism, increased employee retention, reduced health care costs, and increased employee satisfaction. It is also becoming common practice for company benefit plans to include Weight Watchers' meetings on-site, smoking cessation programmes, and wellness services such as chiropractic care and acupuncture. I have personal knowledge that the organisation I worked for provides services such as yoga, massage and circuit training, either for free or at a subsidised cost.

### **3.4 Construction of the regression equation**

Multiple regression analysis was used to produce an equation that will predict a dependent variable using one or more independent variables. In this case, WLB provision/policy (the dependent variable) is specified as a function of various factors, including ROE, total assets, size of the firm as measured by the number of employees, percentage of female participation in the industry, union density measured by the union coverage of the particular organisation, type of company ownership and the rationale for policy implementation (the independent variables).

Multiple regression procedures estimated a linear model of the form:

$$Y = a + B1*X1 + B2*X2 + B3*X3 ..... + Bp*Xp + \Sigma p$$

Where  $Y$  is the dependent variable of the observed WLB, which is weighted index of work life balance using quantitative measurement;  $X1$ ,  $X2$  and so on are the independent variables that are used to predict  $Y$ ;  $B1$ ,  $B2$  and so on are the predicted coefficients or multipliers that describe the size of the effect the independent variables are having on the dependent variable  $Y$ . Multiple regression was extended to deal with situations where the response consists of  $p > 1$  different variables. The analysis was carried out using SPSS (Statistical Package for the Social Sciences).

### **3.5 Preliminary data testing**

Statistical tests depend upon certain assumptions about the variables used in the analysis; however, when these assumptions are not met, the results may not be trustworthy, resulting in a Type I or Type II error, or over- or under-estimation of significance or effect size(s) (Pedhazur, 1997). Several assumptions of multiple regressions are subject to violation – for example, normal distribution of errors, assumptions of linearity and reliability of measurement. Multiple regression assumes that variables have normal distributions; however, non-normally distributed variables (highly skewed or kurtotic variables, or variables with substantial outliers) can distort relationships and significance tests. Therefore, data distribution was tested for skewness and kurtosis. Outliers were identified through visual inspection of frequency distributions.

## Chapter Four: Findings

### 4.0 Introduction

This chapter first provides the results of the descriptive analysis in order to give a clear view of the raw data. This is followed by a detailed analysis of quantitative data gathered from CEAs of 85 organisations, analysing from 1998 to 2008. This analysis is further complemented by data obtained through semi-structured interviews administered to human resources managers and trade union officials from the participating organisations. The data are analysed using the SPSS software to run multiple regressions models. Multiple regression is adopted in this study on the basis that it is a flexible method of data analysis that is appropriate when a quantitative variable (the dependent or criterion variable) is to be examined in relationship to any other factors (expressed as independent or predictor variables) (Cohen, Cohen, West, & Aiken, 2003).

#### 4.0.1 Summary of the data

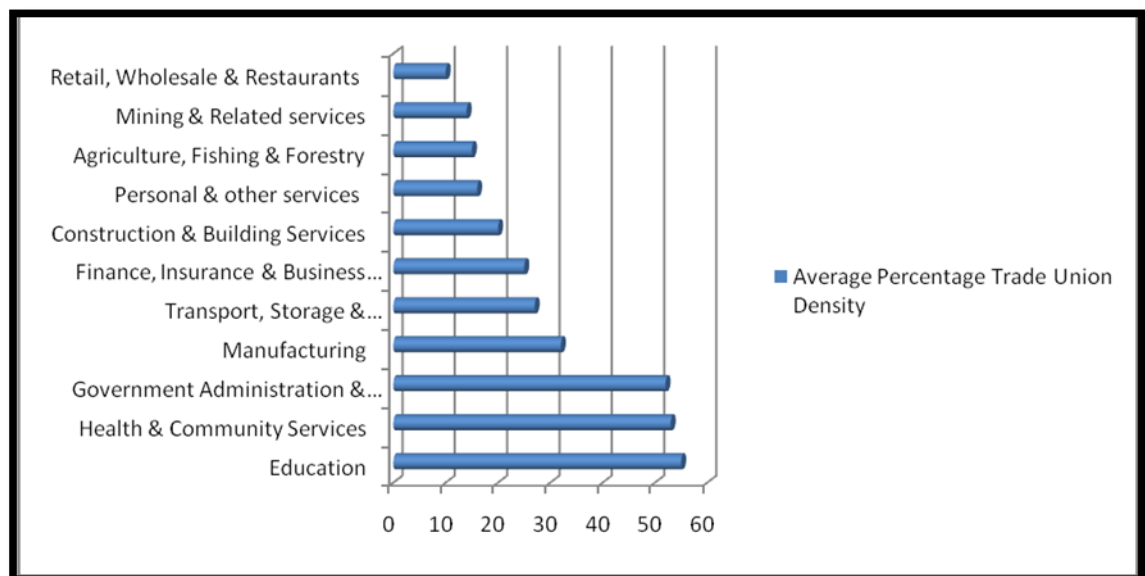
Descriptive statistics were calculated for all interval variables, which include Total Assets, ROE, % Industry Union Density and % Female Participation rate. The results shown in Table 4.1 below indicate an average of 10.5% ROE and 5.6 million dollars Total Assets value. The average % Industry Union Density is 7.2%, which shows that in the total number of organisations observed in this study, union membership is relatively low. However, there are some organisations that have an average of 55% trade union membership, in particular those in the Health sector.

#### 4.1: Descriptive Statistics

	N	Minimum	Maximum	Mean	Std. Deviation
% Industry Union Density	935	0	55	8.45	6.782
% ROE	248	-52.4	60.0	10.470	13.8749
% Industry Female Participation	935	6.0	87.0	37.803	22.0720
Total Assets	242	\$42,019.00	\$1.75E10	\$5.5960E8	\$1.39337E9
Valid N (listwise)	242				

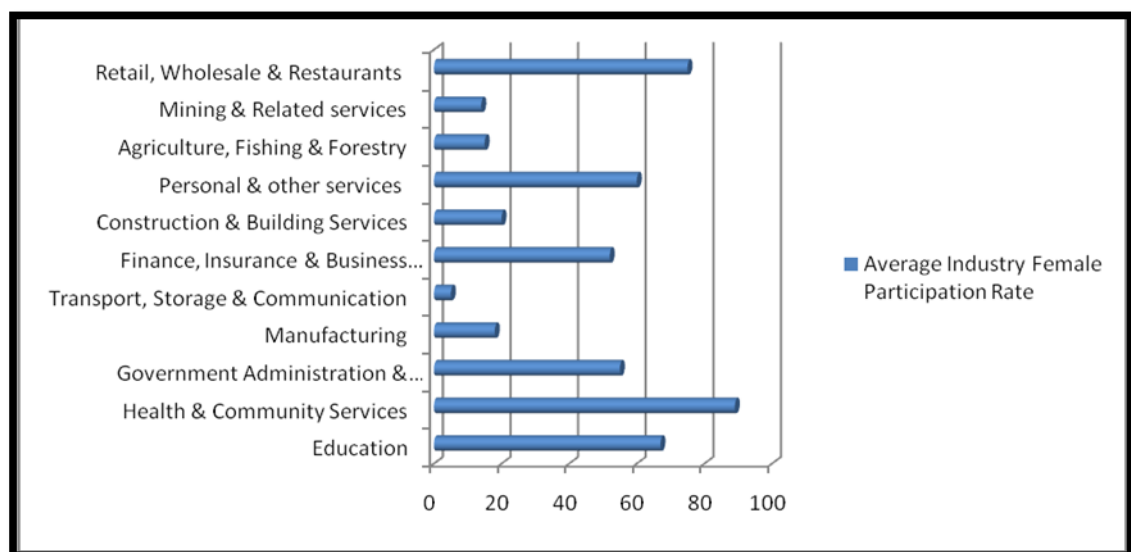
Chart 4.1 shows the concentration of trade union density by industry. Education, Health & Community Services and Government & Defence had the highest rates of union density at 55 %, 53% and 52% respectively, while Retail, Wholesale & Restaurants (10%) and Mining & Related Services (14%) had the lowest.

**Chart 4.1 Trade union membership by industry, 2008**



In analyzing the total number of organisation, on average, the female participation rate at industry level is 37.8%. However, as Chart 4.2 indicate, Health & Community Services (89%), Retail, Wholesale & Restaurants (75%) and Education (67%) have the highest concentration, while Transport, Storage & Communication (5%) has the lowest.

**Chart 4.2 Female participation rates by industry, 2008**



Correlations of all variables were computed using Pearson sig (2 –tailed). As shown in Appendix 5, the correlation matrix (degree of associations between variables) indicates that few of the observed relationships were very strong. The strongest relationship was between % Industry Union Density and Female Participation Rate (.691\*\* p\_ 0.00), which indicates that if an industry has a high union density; it is more likely to have a high female participation rate. Also, Education (.605\*\* p\_ 0.00; .693\*\* p\_ 0.00) and Retail, Wholesale, Restaurants and Hotels (.351\*\* p\_ 0.00; .488\*\* p\_ 0.00) showed a positive correlation with % Industry Union Density and Female Participation Rates respectively.

#### ***4.1 Rationale in implementing WLB provisions/policies***

In exploring the rationale behind the implementation of particular WLB policies a frequency table was produced. While management responses were obtained from human resources managers through the survey questionnaires, trade union officials answered similar questions through phone interviews. As Appendix 4 indicates, the specific questions asked of the respondents include the availability of any WLB policies outside the CEA, the rationale behind their implementation and the period in which they were applied. It was crucial to obtain this information from both human resources managers and trade union officials in order to obtain complementary responses, at the same time utilising the opportunity of a high response rate.

The first stage in the analysis of these data was to calculate the prevalence of each policy, either in the CEAs or outside CEAs (i.e., in company policy documents).

**Table 4.2 WLB Policy Provisions**

WLB Policy	Within CEAs	%	Outside CEAs	%
Special Leave	781	83.5	29	3.1
Flexible Working	307	32.8	74	7.9
Top-up Re-entry	278	29.7	0	0
Extended Leave Without Pay	267	28.6	4	0.4
Top-up Bereavement	132	14.1	55	5.9
Job-sharing	50	5.3	74	7.9
Phased Retirement	47	5	67	7.2
Working from Home	26	2.8	48	5.1
Top-up Parental	25	2.7	18	1.9
Subsidised Childcare	18	1.9	0	0
Subsidised Exercise	0	0	19	2

Table 4.2 shows that the special leave provision is available in most organisations (83.5%). However, this provision is more likely to be included in the CEAs, with only 3.1% available in other company policy documents. Subsidised exercise is the least available provision, with only 2% of the organisations providing this policy outside CEAs. Most organisations seem to prefer offering flexible working (74%) and job-sharing (74%) policies outside the CEAs. Subsidised childcare (1.8%) and top-up re-entry leave (14.1%) provisions are available only through collective bargaining and not outside CEAs.

The second stage involved analysing the rationale in implementing each WLB policy by running a frequency table, first for policies within CEAs (Table 4.3) and secondly for policies outside CEAs (Table 4.4). It is critical to separate the two forms of data as a way of ascertaining any differences between the two.

**Table 4.3: Rationale for Implementing WLB policies within CEAs**

WLB Policy	Labour Market Competition		Management Benevolence		Increase in Women's Participation	
		%		%		%
Flexible Working	74	7.9	70	7.5	134	14.3
Job-sharing	11	1.2	3	0.3	36	3.9
Working from Home	0	0	100	10.7	8	0.9
Extended Leave Without Pay	45	4.8	62	6.7	100	10.7
Top-up Re-entry	33	3.5	69	7.4	130	13.9
Subsidised Childcare	6	0.6	0	0	11	1.2
Phased Retirement	36	3.9	0	0	7	0.7
Top-up Parental	58	6.2	58	6.2	273	29.2
Top-up Bereavement	1	0.1	65	7	0	0
Special Leave	4	0.4	0	0	21	2.2
Subsidised Exercise	6	0.6	19	2	0	0
<b>Total</b>	<b>274</b>	<b>19%</b>	<b>446</b>	<b>31%</b>	<b>720</b>	<b>50%</b>

Table 4.3 indicates that within CEAs, provisions such as flexible working (14.3%), extended leave without pay (10.7%), top-up re-entry (13.9%) and top-up parental (29.2%) were provided as a result of the increase in women's participation. However, top-up bereavement leave (7%) was implemented as a result of management benevolence. On the other hand, phased retirement (3.9%) and subsidised exercise (0.6%) were arrangements made to cater for labour market competition.

**Table 4.4: Rationale for Implementing WLB policies outside CEAs**

WLB Policy	Labour Market Competition	%	Management Benevolence	%	Increase in Women's Participation	%
Flexible Working	28	3	22	2.4	24	2.6
Job-sharing	19	2	21	2.2	27	2.9
Working from Home	12	1.3	18	1.9	24	2.6
Extended Leave	4	0.4	0	0	0	0
Top-up Re-entry	0	0	0	0	0	0
Subsidised Childcare	0	0	0	0	0	0
Phased Retirement	24	2.6	43	4.6	0	0
Top-up Parental	11	1.2	18	1.9	0	0
Top-up Bereavement	21	2.2	26	2.8	0	0
Special Leave	11	1.2	7	0.7	0	0
Subsidised Exercise	4	0.4	15	1.6	0	0

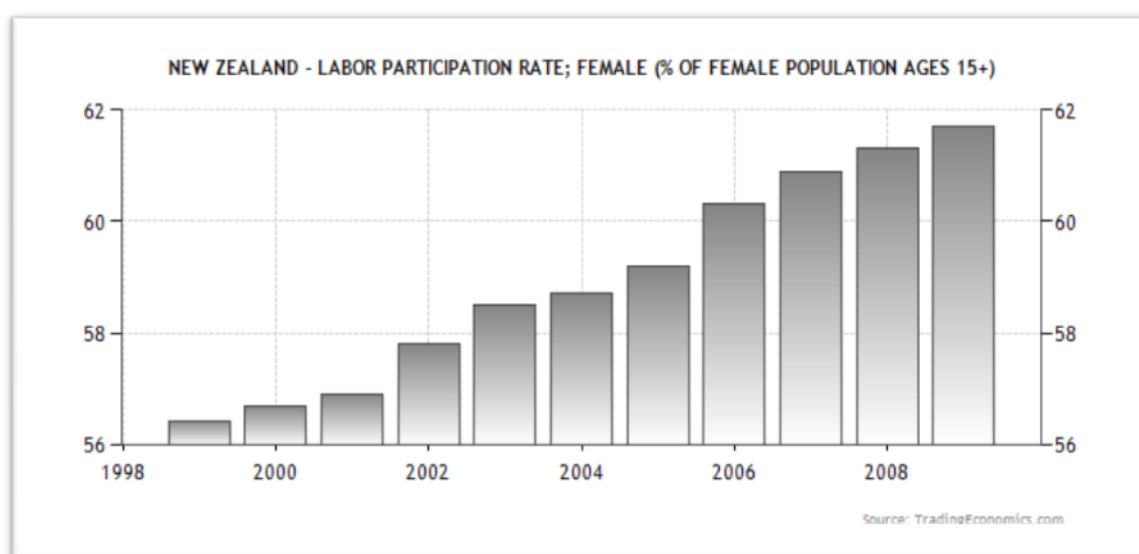
As for policies offered outside the CEAs, flexible working (2.6%), job-sharing (2.9%) and working from home (2.6%) provisions were offered due to the increase in women's participation rates. The rationale behind the implementation of phased retirement and top-up bereavement leave outside CEAs is not different from when they are included in the CEAs, showing that management benevolence prevailed in their implementation. However, contrary to when it is included in the CEAs, the special leave provision is offered outside CEAs as a result of management benevolence.

The findings in Tables 4.3 & 4.4 show that most organisations who responded to the survey questionnaires reported that the implementation of WLB provisions/policies was mainly driven by the increase in the number of women in the workforce. The results indicate that, as more women take up paid work, there is a rising demand for more flexibility in the way they work, to help improve the quality of their lives, reduce stress and enable them to meet their caring responsibilities. Consistent with the Families Commission's (2008) 'give and take' report, this may further suggest that social trends and changes to family life and workforce participation – in particular, the increase in one-parent families, three-quarters of which are headed by women – are having a major impact on the need for flexible working conditions. This results in pressure for the custodial parent in the workforce as they juggle work, parenting and household chores, and arranging childcare.

Management benevolence reflected a contribution towards the implementation of WLB provisions/policies. Again, these findings point to the significance of the WLB agenda within the business community and the increasing tendency by employers to adopt better WLB schemes, given their apparently positive impact on firm performance, particularly in more competitive markets ( Bloom, Kretschmer, & Van Reenen, 2006). As Table 8 shows, the remaining contribution came as a result of the competition in the labour market. Previous studies assert that, for an organisation to achieve recognition, a firm's brand identity needs to be constructed using a balanced package of explicit human resources management policy offerings (e.g., WLB considerations) that represent value to both its current and potential employees (Backhaus & Tikoo, 2004; Wickham & Parker, 2007). Thus, understanding what the firm is able and willing to offer may attract highly skilled people to enter, remain, and perform effectively in the employment relationship.

Chart 4.3 shows that the female labour participation rate (% of female population ages 15+) in New Zealand dramatically increased during the period 1998 to 2008. According to the World Bank, the female participation rate was reported at 61.7% in 2008, from 56.5 % in 1998. These figures are commensurate with over 20 years of the government's effort to transform New Zealand from an “agrarian economy dependent on concessionary British market access to a more industrialized, free market economy that can compete globally” (New Zealand GDP Growth Rate, 2011, p. 1). To employers, this trend indicates more pressure and demand for flexible working arrangements.

Chart 4.3





## ***4.2 The impact of legislation on the implementation of WLB policies***

Government policy and legislation, though based on a business case motive, has had a positive impact in the implementation of WLB policies in New Zealand. Since 1999, the governments have introduced significant changes to employment legislation and social policy with the intention of improving the conditions for working parents (refer to Table 2.1). Legislative changes have had a significant influence on most WLB policies, including those offered either in CEAs or as part of company policy.

### **4.2.1 Influence of legislation on flexible working provisions**

Since late 2007 the New Zealand government has responded to the request for flexible working by passing into law the provision of flexible working arrangements by enacting the Employment Relations (Flexible Working Arrangements) Act. The Act is essentially intended to provide guidelines to both employers and employees in relation to more flexible working arrangements, allowing employees the ability to propose changes to their work environment, including the place they work, the hours and the days.

‘Flexible working’ in this context refers to flexibility by employees to vary the hours or schedule of working time. This includes flexible working hours (hours/shifts), flexible days of work (reduced/increased, nights or weekends), flexible working locations or methods, sabbaticals or job rotation. In New Zealand, the issue of flexible working arrangements looks set to become of increasing importance in the workplace. According to the Department of Labour (2007), more employees seem to be placing significance on greater balance in their lives – 43% of employees in New Zealand care for another person (whether a child or an elderly relative). As such, employers who respond to this rising demand from employees are likely to be employers of choice, and also achieve a competitive advantage, given the long-term benefits that flexible working arrangements can bring.

Analysis of the data collected in the research study shows that the provision of flexible working arrangement as WLB policy increased by 50% since 2007, revealing the positive impact of legislation in that respect. Second to the special leave provision, flexible working arrangement policy is provided at 32.8% in CEAs and 7.8% outside CEAs, demonstrating high significance within most company WLB policy provisions.

This also suggests that the flexible working condition is provided mainly through collective bargaining. Nonetheless, the less proportion of provision (7.8%) of this policy outside the CEAs may also reflect employers' response to any request they receive in good faith.

#### **4.2.2 Influence of legislation on leave schemes**

Leave provisions are the most prevalent policies in all the organisations (83.5%) that participated in this research study. Leave provisions include parental leave (maternity/paternity/adoption), extended leave, care leave (for family), sabbatical/career breaks and educational/training leave. Leave provisions are mainly included in the CEAs (83.5%) and rarely in company policies (3.1%).

The development of parental leave was marked by the introduction of maternity leave to New Zealand's public sector in 1948, but was not legislated for workers in the private sphere until 1980. The Maternity Leave and Employment Protection Act 1980 instituted job-protected leave for up to 26 weeks, offered on condition of fulfilling 18 months of continuous employment working more than 15 hours per week. This period was further increased to 12 months' unpaid parental leave provision through the Parental Leave and Employment Protection Act 1987.

Since then this Act has gone through several amendments. This includes the 1 July 2002 amendment (to provide for a new state-funded scheme of 12 weeks' paid leave), 1 December 2004 amendment (to increase this paid entitlement to 13 weeks, and to provide for some entitlements for those who have worked the previous 6 months) and 1 December 2005 amendment (entitlement increased further to 14 weeks). Parental leave payments are funded by the government through general taxation and payment is based on replacing 100% of previous earnings. However, a maximum payment level is calculated at the average weekly earnings for New Zealand employees. In addition, all pregnant employees are entitled to a period of 10 days' special leave during their pregnancy to attend medical appointments.

By law, parental leave is made up of four types of unpaid leave: maternity leave (14 continuous weeks), special leave (up to 10 days), paternity/partner's leave (up to 2 weeks) and extended leave (up to 52 weeks).

Some employees have additional parental leave provisions under their employment agreement or in company policy documents. The availability of parental leave provisions under company policy demonstrates that some organisations may be offering this policy above the legislative minimum. Similarly, the increase in the provision of parental leave has contributed to the redundancy of other provisions, such as the re-entry leave.

### **4.2.3 The influence of legislation on phased retirement and subsidised exercise**

#### *Phased retirement*

Phased retirement refers to an arrangement in which an employee's hours of work are progressively reduced by a mutually agreed amount, over a mutually agreed period, culminating in full retirement at a specified date. In the current context, in which workers with skills, qualifications and experience can pick and choose the country in which to live and work, there is an increasing international battle for skills. As such, some organisations in New Zealand are leading the fight against the skills shortage by working harder to retain older workers, utilising flexible contract arrangements to lure back those who have retired. Phased retirement schemes are offered in conjunction with other WLB policies, such as job-sharing, flexible hours, compressed work schedules, vacation buying and selling, working from home, elder care support and wellness accounts.

Apart from legislation regulating the delivery and entitlements of retirement income, in New Zealand there is no legislation that compels organisations to offer the phased retirement provision. However, due to the aforementioned factors most organisations are finding relevance in the implementation of phased retirement provision as a WLB policy. In the list of organisations who participated in this research study, this provision is included in both CEAs (5%) and as company policy (7%). These findings are consistent with the results from the Hudson (2007) report in which it was found that most people aged between 45–65 years preferred to continue part-time work (66%) and flexible working arrangements (64%). That report also noted that finances and health were the main factors that working respondents think would affect their decision on when to retire.

### *Subsidised exercise*

This is a WLB policy offered to engage employees in physical activity during their work day by offering onsite exercise programmes at no cost or subsidised fees. These activities are organised by employees. Using my personal experience whilst working at one of the local organisations, taking part in physical activities alongside colleagues may contribute to the vibrancy of the organisation's culture, allowing staff to develop relationships with others across different areas and levels of the organisation. Even though there are a few companies offering this provision, it is the newest model to be used by organisations as part of the WLB package. This policy is offered outside legislation – however, it is a strategy intended to nurture organisational culture by promoting the opportunity both for staff to get active and to spend time socialising with colleagues outside of the work environment (UMR Research, 2003). Normally, a conscious effort is made to select gentle and easy activities to get people started with physical activity. This includes lunchtime running and walking groups; yoga sessions during lunchtime and directly after work on the premises; lunchtime volleyball and soccer sessions; dance, kayaking, roller-blading and rock climbing sessions; free passes to fitness classes at a local gym; and information about local community physical activity events.

### **4.2.4 Deriving WLB index**

A weighted index refers to a number in which component items are weighted according to some system of weighting to reflect their relative importance (Marriott, 2002). Although various weighting systems have been employed in several research studies, all index numbers are weighted by implication; for example, the OECD launched its Better Life index as a way of measuring happiness in member countries that goes beyond the cold hard numbers of GDP (OECD, 2011). To obtain Total WLB provisions, policies or a combination of the two, an index was created. Since there is no previous research that has produced a WLB policy index based on the prevalence weighting, the current index was derived from the total frequency of each policy in each year and a weighting system was used to allocate points (see Table 4.5). For example, analysis of a decade (1998–2008) in each organisation showed that out of 850 observations the top-up parental leave provision had the highest frequency of 810 times. On that basis, out of 11 WLB policies considered in this research study, the provision of top-up parental leave was allocated the highest points of 11.

**Table 4.5: Frequency of WLB policies**

Provision/Policy	Observations	Frequency	Weighting Points
Subsidised Child Care	850	18	1
Subsidised Exercise	850	19	2
Special Leave	850	37	3
Working from Home	850	74	4
Phased Retirement	850	114	5
Job-sharing	850	123	6
Top-up Bereavement Leave	850	188	7
Top-up Re-entry Leave	850	278	8
Extended Leave Without Pay	850	300	9
Flexible Time	850	379	10
Top-up Parental Leave	850	810	11

In response to the literature review, the analysis focuses on factors that could contribute to the inclusion of WLB provisions within CEAs. Referring back to the literature, these factors include financial performance of the organisation (percentage ROE and Total Assets), percentage industry trade union density, ownership type (private or public), type of industry, percentage industry female participation rate, and legislation (according to the year of implementation). A series of separate regressions was run using these factors as predictors or independent variables.

### ***4.3 Factors influencing the implementation of WLB policies included in CEAs***

As illustrated by the regression model below, a multiple regression analysis to identify factors that have an influence on WLB policies within CEAs was run using WLB provisions index as a depended variable. The total WLB provisions index was calculated from the weighting allocated to each provision, as determined by the frequency of that provision in all organisations.

As indicated in the literature review, it is anticipated that collective bargaining is a crucial instrument in advancing the reconciliation of family and work life. Hence, it is assumed that all WLB provisions included in the collective employment agreement were implemented as a result of collective bargaining. Due to the complexity of measuring variables such as trade union density and female participation rate at company level, industry level data were used as a proxy. However, the other variables were measured at company level.

Dummy variables were used to indicate: (1) whether organisations were privately or publicly owned; (2) the type of industry each organisation belongs to; (3) the years from 1998 to 2008. The year 2000 was excluded from the model, since it was in the same period in which the Employment Relations Act 2000 was enacted.

*Total WLB policies included within CEAs (Y) = a + Year (B1\*X1) + Total Assets (B2\*X2) + ROE (B3\*X3) + % Industry Union Density (B4\*X4) + % Industry Female Participation Rate + (B5\*X5) + Ownership Type (B6\*X6) + Personal & other services (B7\*X7) + Manufacturing (B8\*X8) + Finance, Insurance & Business services (B9\*X9) + Education (B10\*X10) + Transport, Storage & Communication (B11\*X11) + Construction & Building Services (B12\*X12) + Government Administration & Defence (B13\*X13) + Health & Community Services (B14\*X14) + Agriculture, Fishing & Forestry (B15\*X15) + Retail, Wholesale & Restaurants (B16\*X16) + Mining & Related Services (B17\*X17)*

As indicated in Table 4.6 above, the model fit of  $R^2$  0.208, suggests that all the independent variables entered in this model are contributing 21% to the outcome on WLB policies included in the CEAs. A *Durbin Watson* value of 1.165 shows a positive correlation between adjacent residuals, suggesting that the assumption of independent errors in this model is tenable or the multiple regression and the coefficients using *t* statistics are valid. This value is also significant, for example, Field (2009) claims that any values of the *Durbin Watson* greater than 2 or less than 1 can be alarming. However, values closer to 2 can also be problematic depending with the sample size and model. Therefore, since the *Durbin Watson* statistic is not less than 1.0, there is no cause for concern, for any values less than 1 may cause inflated values of the *t* test.

Out of all the independent variables entered, only nine were significant: which are Type of Ownership (Beta = -0.914,  $p < .005$ ), % Industry Female Participation Rate (Beta = 0.39,  $p < .000$ ), % Industry Union Density (Beta = 0.527,  $p < .078$ ), Health & Community Services (Beta = 25.372,  $p < .000$ ), Government Administration & Defence (Beta = 8.915,  $p < .095$ ), Finance, Insurance & Business Services (Beta = 14.589,  $p < .017$ ), Year\_2008 (Beta = 6.395,  $p < .026$ ), Year\_2007 (Beta = 7.621,  $p < .004$ ), Year\_2005 (Beta = 4.673,  $p < .064$ ) and Year\_2004 (Beta = 6.223,  $p < .016$ ).

**Table 4.6: Multiple regression on WLB provision**

Variable	B	Beta	Sig
Year_2008	6.395	0.114	0.026
Year_2007	7.621	0.154	0.004
Year_2005	5.112	0.172	0.054
Year_2005	4.673	0.106	0.064
Year_2004	6.223	0.13	0.016
Year_2003	2.562	0.056	0.318
Year_2002	2.561	0.059	0.307
Year_2001	1.408	0.026	0.6
Year_1999	-3.979	-0.041	0.289
Year_1998	-1.517	-0.02	0.643
% ROE	-0.054	-0.064	0.327
Total Assets	-9.94E-10	-0.117	0.084
% Industry Union Density	0.527	0.218	0.078
% Industry Female Participation Rate	0.39	0.54	0
Type of Ownership	-0.914	0.18	0.005
Manufacturing	5.802	0.185	0.215
Mining & Related Services	15.087	0.229	0.013
Finance Insurance Business Services	14.589	0.409	0.017
Education	14.356	0.303	0.051
Agriculture Fishing & Forestry	-21.208	-0.163	0.021
Transport Storage & Communication	3.803	0.091	0.441
Retail Wholesale Restaurants Hotels	21.236	0.376	0.012
Government Administration & Defence Services	8.915	0.338	0.095
Construction & Building Services	-4.538	-0.065	0.446
Energy & Utility Services	2.909	0.06	0.601
Health and Community Services	25.372	0.429	0
Sport and Recreation	5.439	0.096	0.357

*Deburn-Watson = 1.165*

*R<sup>2</sup> = 0.208*

*N = 245*

The Type of Ownership factor has the following values: Beta = -0.914,  $p < .005$ , suggesting that organisations that are in the public sector are more likely to provide WLB provisions than are private sector organisations. Hence, for every single increase in the number of private organisations, it is expected that, on average, a decrease of 18.2% in WLB provision will result.

These findings may be paralleled with those in Hudson's (2007) exploration of the notion of work-life balance, including the empirically grounded benefits for employers and employees. Besides outlining the cultural inhibitors to the implementation of WLB in New Zealand and Australia, he found out that, like large businesses, public organisations are inclined to respond to public pressure for WLB measures because they are more likely to be evaluated in terms of social legitimacy norms, while private-sector organisations are more likely to be evaluated in terms of profit-related standards. In a similar vein, as one of the employers responded, the findings may suggest that the public sector has had to make particular efforts to attract and retain staff, and has sometimes compensated for offering lower pay levels than the private sector by offering more attractive working arrangements.

The union density, as determined by the percentage at industry level (Beta = -0.096,  $p < .071$ ) and Total Assets (Beta = 0.527,  $p < .078$ ), was also a significant predictor of *Total WLB policies included within CEAs*. The results show that for every single percentage increase in industry union density, on average, it is expected that there will be a corresponding increase in WLB provision of 21.8%. Also, % Industry Female Participation Rate (Beta = 0.39,  $p < .000$ ) illustrated that for every percentage increase there is an equivalent 54% impact on WLB provision.

In line with previous research (Gerstel & Clawson, 2001; Milner & Gregory, 2009), these findings may demonstrate that, as trade unions are becoming more feminised in terms of membership and leadership, opportunity structures in WLB policies are beginning to open up.

Some industry sectors indicated as strong predictors of the WLB provision. These are the Health & Community Services (Beta = 25.372,  $p < .000$ ), Government Administration & Defence (Beta = 8.915,  $p < .095$ ), and Finance, Insurance & Business Services (Beta = 14.589,  $p < .017$ ). The results indicate that, for every increase in any of these sectors, it is highly likely that there will be an increase in the WLB provision index of 33.8%, 42.9% and 40.9% respectively. However, by comparing the magnitude of the *t*-test it can be identified that the Health Services industry has a slightly more positive impact than both the Government Administration and Business Services areas.



These results suggest several factors. Firstly, because of the working environment in these industries, there is a legislative requirement to provide WLB provisions. Secondly, these industries have high female participation rates and high union densities; hence, as previously reflected in the literature review (Budd & Mumford, 2004), this could be a reflection of the strength of the trade unions in negotiating for the welfare and well-being of their members.

Year\_2008 (Beta = 6.395,  $p < .026$ ), Year\_2007 (Beta = 7.621,  $p < .004$ ), Year\_2005 (Beta = 4.673,  $p < .064$ ) and Year\_2004 (Beta = 6.223,  $p < .016$ ) indicate a positive impact on *Total WLB policies included within CEAs*. These findings may suggest the legislative impact on WLB issues. Consistent with this period was the enactment of the Parental Leave and Employment Protection Amendment Acts 2004, 2005, and 2006, the Employment Relations (Flexible Working Arrangements) Amendment Act 2007 and the Employment Relations (Breaks, Infant Feeding, and Other Matters) Amendment Act 2008.

#### ***4.4 Factors influencing the implementation of WLB policies outside the CEAs***

Discussions of WLB issues are presently much in vogue among media, government agencies, employers, politicians and trade unions in New Zealand. Furthermore, much of the growing amount of research into WLB reflects the widespread interest in the topic, with evidence of a high level of support from both employers and employees. The phenomenon has become the panacea that will help resolve, among other things, ‘the care squeeze, reduce absenteeism and increase productivity, tackle long hours working, build “employers of choice”, enhance gender equity and enable New Zealand to compete in the global economy’ (Domett, 2006, p. 24). Hence, besides offering WLB provisions in the collective employment agreement, some employers are extending the offer to include WLB policies as company policy. Thus it is critical to identify the factors that shape some of these policies and compare them with provisions available through collective agreements.

Using the same independent variables as used in the model for WLB policy provision included in CEAs, a multiple regression analysis was run to identify their effect on Total WLB Policy (policies provided outside the collective employment agreement). However, since it was difficult to obtain historic data from human resources managers, some of whom have since left the organisations (each year from 1998 to 2008), the year was applied as a discrete variable. The same weighting as in WLB provisions (see Table 6) was also allocated to each WLB policy in order to create the WLB policy index. To differentiate between WLB policies provided through CEAs and those provided outside CEAs, the term ‘provisions’ will be used to refer to the former and ‘policies’ to the later. The regression model is shown below.

$$\begin{aligned} \text{Total WLB policy outside CEAs (Y)} = & a + \text{Year (B1*X1)} + \text{Total Assets (B2*X2)} + \text{ROE} \\ & (\text{B3*X3}) + \% \text{ Industry Union Density (B4*X4)} + \% \text{ Industry Female Participation Rate +} \\ & (\text{B5*X5}) + \text{Ownership Type (B6*X6)} + \text{Personal \& other services (B7*X7)} + \\ & \text{Manufacturing (B8*X8)} + \text{Finance, Insurance \& Business services (B9*X9)} + \text{Education} \\ & (\text{B10*X10}) + \text{Transport, Storage \& Communication (B11*X11)} + \text{Construction \&} \\ & \text{Building Services (B12*X12)} + \text{Government Administration \& Defence (B13*X13)} + \\ & \text{Health \& Community Services (B14*X14)} + \text{Agriculture, Fishing \& Forestry (B15*X15)} \\ & + \text{Retail, Wholesale \& Restaurants (B16*X16)} + \text{Mining \& Related services (B17*X17)} \end{aligned}$$

The regression results in Table 4.7 shows a model fit of  $R^2$  0.345, revealing a total 34.5% variables contribution to the outcome of WLB policy. Also, a positive correlation between residual errors is shown through a *Durbin Watson* value of 1.181. Significant predictors include % Industry Female Participation Rate (Beta = 10.668,  $p < .001$ ), % Industry Union Density (Beta = 1.121,  $p < .000$ ), Health & Community Services (Beta = 14.454,  $p < .000$ ), Government Administration and Defence (Beta = 8.822,  $p < .044$ ), Finance, Insurance & Business Services (Beta = 15.187,  $p < .007$ ), Education (Beta = 10.508,  $p < .013$ ).

**Table 4.7: Multiple regression on WLB policy outside CEAs**

Variable	B	Beta	Sig
Year_2008	1.547	0.058	0.527
Year_2007	2.58	0.11	0.258
Year_2006	2.701	0.073	0.542
Year_2005	1.703	0.082	0.43
Year_2004	2.229	0.099	0.311
Year_2003	-0.043	-0.002	0.984
Year_2002	2.15	0.105	0.319
Year_2001	0.7	0.027	0.762
Year_2000	-0.309	-0.013	0.891
Year_1999	-0.312	-0.007	0.923
Year_1998	0.465	0.013	0.869
% ROE	0.027	0.047	0.475
Total Assets	2.53E-10	0.044	0.524
% Industry Union Density	1.121	0.982	0.000
% Industry Female Participation Rate	10.668	0.338	0.001
Type of Ownership	16.916	0.442	0.004
Manufacturing	2.669	0.126	0.408
Mining & Related Services	-0.91	-0.02	0.826
Finance, Insurance & Business Services	15.187	0.498	0.007
Education	10.508	0.264	0.013
Agriculture, Fishing & Forestry	-3.085	-0.035	0.624
Transport Storage & Communication	4.967	0.175	0.145
Retail, Wholesale, Restaurants & Hotels	-1.971	-0.124	0.217
Government Administration & Defence Services	8.822	0.222	0.044
Construction & Building Services	-1.078	-0.023	0.793
Energy & Utility Services	3.928	0.119	0.306
Health & Community Services	14.454	0.361	0.002
Sport & Recreation	2.423	0.063	0.552

*Deburn-Watson = 1.181*

*R<sup>2</sup> = 0.345*

*N = 245*

As in the WLB provision (included within CEAs), the results in Table 4.7 suggest that % Industry Female Participation Rate (Beta = 10.668,  $p < .001$ ) and % Industry Union Density (Beta = 1.121,  $p < .000$ ) have a positive contribution to the Total WLB policy (provisions outside CEAs). At industry level, any percentage increase in female participation rate or industry union density is likely to cause, on average, impacts of 33.2% and 98.2% respectively on the provision of Total WLB policy.

This is a clear indication that, in addition to promoting WLB provisions through CEAs, trade unions are also in the forefront in encouraging organisations to offer WLB policies above minima. Various types of industry also indicated a positive influence on the provision of Total WLB policy. These include Health & Community Services (Beta = 20.199,  $p < .000$ ), Government Administration and Defence (Beta = 8.822,  $p < .044$ ), Finance, Insurance & Business Services (Beta = 15.187,  $p < .007$ ), Education (Beta = 10.508,  $p < .013$ ).

Consistent with the increase in female participation rate, except in Sport and Recreation, these industry sectors tend to have a high female participation rate, therefore, the dominance of women in these sectors could be associated with the advancement of WLB initiatives. In addition, this trend could be a result of management benevolence. As organisations are beginning to realise the benefits of implementing WLB programmes – for example, reduction of costs in recruitment and retention, improved performance and reduced absenteeism (Equal Opportunity Trust, 2007) – the implementation of such policies is on the increase.

#### ***4.5 Factors influencing the Total WLB (combination of policies and provisions)***

In an attempt to identify whether there are any differences in terms of the predictor variables that would cause an effect on Total WLB (combination of WLB policies and provisions indices), a multiple regression was run. The Total WLB was calculated simply by adding the WLB provision and policy indices. The formula of the regression model and the results are shown below.

*Total WLB (combination WLB policies and provisions indices) (Y) = a + Year (B1\*X1) + Total Assets (B2\*X2) + ROE (B3\*X3) + % Industry Union Density (B4\*X4) + % Industry Female Participation Rate + (B5\*X5) + Ownership Type (B6\*X6) + Personal & other services (B7\*X7) + Manufacturing (B8\*X8) + Finance, Insurance & Business services (B9\*X9) + Education (B10\*X10) + Transport, Storage & Communication (B11\*X11) + Construction & Building Services (B12\*X12) + Government Administration & Defence (B13\*X13) + Health & Community Services (B14\*X14) + Agriculture, Fishing & Forestry (B15\*X15) + Retail, Wholesale & Restaurants (B16\*X16) + Mining & Related services (B17\*X17)*

From 245 observations the model shows an  $R^2$  of 0.274, indicating a 27.4% contribution to Total WLB index. The model also illustrates a *Durbin Watson* value of 1.22, indicating positive correlation between residual errors. Similar to the preceding models (WLB provisions and policies), the significant values were: % Industry Female Participation Rate (Beta = 17.73,  $p < .031$ ), % Industry Union Density (Beta = 1.917,  $p < .031$ ), Health & Community Services (Beta = 22.651,  $p < .031$ ), Government Administration & Defence (Beta = 17.635,  $p < .003$ ), Finance, Insurance & Business Services (Beta = 12.905,  $p < .014$ ) and Education (Beta = 10.46,  $p < .058$ ).

Controlling for the Year and Ownership type variables, the findings demonstrate that, on average, an increase in % Industry Female Participation Rate (Beta = 17.73,  $p < .031$ ) and % Industry Union Density (Beta = 1.917,  $p < .031$ ) is expected to contribute 27.8% and 50.1% respectively to the provision of WLB policies/provisions, both within CEAs and outside CEAs.

As in the other two models, these findings support the positive influence of trade union density and the increase in female participation rate. Also, according to the results, the same industry sectors (Health & Community Services (Beta = 22.651,  $p < .031$ ), Government Administration & Defence (Beta = 17.635,  $p < .003$ ), Finance, Insurance & Business Services (Beta = 12.905,  $p < .014$ ) and Education (Beta = 10.46,  $p < .058$ ) have a significant impact on the outcome on Total WLB index. After comparing the magnitude of the  $p$ -values on these industries, it can be identified that the Government administration, with a  $p$  value of .003, has a slightly more positive impact than the rest.

These results may be different from those of previous research. For example, in a study conducted in the United States, Galinsky and Bond (1998) discovered that, in terms of WLB provision, Finance, Insurance and Real Estate are the most generous industries, while the wholesale and retail industries were the least generous. The slight differences demonstrate changes that have occurred over time and the likelihood of different countries having varying results.

**Table 4.8: Multiple regression on Total WLB (combined policies & provisions)**

Variable	B	Beta	Sig
Year_2008	3.147	0.035	0.327
Year_2007	1.71	0.101	0.558
Year_2006	2.712	0.064	0.512
Year_2005	1.612	0.099	0.23
Year_2004	1.331	0.098	0.345
Year_2003	-0.134	-0.012	0.874
Year_2002	1.25	0.115	0.218
Year_2001	0.6	0.029	0.662
Year_2000	-0.899	-0.008	0.981
Year_1999	-0.489	-0.005	0.633
Year_1998	0.562	0.021	0.659
% ROE	-0.073	-0.103	0.108
Total Assets	-1.20E-09	-0.162	0.216
% Industry Union Density	0.917	0.501	0.031
% Industry Female Participation Rate	17.73	0.278	0.012
Type of Ownership	15.634	0.27	0.003
Manufacturing	2.837	0.103	0.483
Mining & Related Services	-4.302	-0.209	0.032
Finance Insurance Business Services	10.033	0.32	0.057
Education	10.46	0.164	0.058
Agriculture Fishing & Forestry	-17.777	-0.156	0.025
Transport Storage & Communication	-2.031	-0.055	0.634
Retail Wholesale Restaurants Hotels	4.913	0.099	0.499
Government Administration & Defence Services	17.635	0.277	0.003
Construction & Building Services	-3.566	-0.058	0.489
Energy & Utility Services	-0.754	-0.018	0.875
Health and Community Services	22.651	0.22	0.031
Sport and Recreation	2.807	0.057	0.583

*Deburn-Watson = 1.22*

*R<sup>2</sup> = 0.274*

*N = 245*

## **Chapter Five: Conclusions and Implications**

### ***5.0 Introduction***

This study has provided some evidence which suggest that the inclusion of WLB provisions/policies is mainly determined by industry trade union density, industry women participation rate, legislation, type of industry, management benevolence and increase in labour market competition. The conclusion chapter provides a summary of the main findings of the research, evaluating whether these findings have fulfilled the objective of the research as outlined in the research design. Secondly, the chapter highlights the limitations of the research methodology in light of future studies in the same subject area. The research study explored the factors that shape the inclusion of WLB provisions/policies within CEAs in New Zealand.

### ***5.1 Summary of the main findings***

#### **5.1.1 Effect of industry union density and female participation rate on WLB**

Evidence in this study indicate that with the increasing employment of women in New Zealand, new needs are arising, not only for women workers but also for men, as dual-earner couples with dependents struggle to manage their family responsibilities while coping with the demands of work. Recognizing this new reality has created an opportunity for strengthening the trade union movement by showing that trade unions are responding to the evolving needs of workers. Trade unions have become increasingly involved in promoting the needs of workers with family responsibilities, in particular, through collective bargaining, as they negotiate various types of WLB provisions.

An analysis of the findings on WLB provisions available through collective agreements established from 1998 to 2008 found that the most frequent clause, found in 85 per cent of agreements, was the paid parental leave provision. Although legislation in New Zealand provides for paid parental, improving on legislation by increasing the length may have been one of the more frequent gains achieved through collective bargaining, even before paid parental leave.

In collective bargaining, there may be more scope for nonwage benefits, for example, flexible time arrangements or short leave for a family emergency. Similarly, it was noted that in some CEAs, organisations were providing more time in the policies, above what is set in the legislation, for example top-up bereavement, re-entry and special leave provisions. Such benefits can make a big difference to employees and may be more important to them than a small wage increase. On the other hand, the employer's response was also notable through the provision above minima of part or all of these provisions.

This study has provided some support for the role of trade unions on issues of WLB, in particular, negotiating improvements in WLB policies that affect workers' well-being. The majority of the policies provided are included in the CEAs (83%), implying that they have been passed through collective bargaining. However, the influence of the unions can also be associated with the increase in women participation levels and their involvement in trade union committees and activities. All sectors with high percentage industry female participation levels provided more WLB provisions. This trend reveals the need to ensure sustenance of women's ability to retain attachment to the paid workforce, and make real and beneficial choices about paid work and family commitments. The findings from the research also indicate that industries with a high concentration of female participation rates, such as Health & Communities Services (87%) and Education (65%) have emerged to be in the forefront of WLB provisions. This trend demonstrates that, with New Zealand women working more now than ever before (5% increase from 1998 to 2008), there is a high demand for WLB initiatives to improve the balance in paid and/or unpaid work, personal and professional goals, family, community and cultural responsibilities, interests and obligations.

### **5.1.2 Differences between private and public organisations on WLB**

The study findings collectively show a chasm in the providence of WLB policies/provisions between public and private-sector organisations. More than 85% of the public-sector organisations that participated in this study recognised that WLB was essential for its employees, with most organisations having formal policies included either in the CEAs or company policy documents. The results are consistent with previous studies (Den Dulk, 2001; J.M. Evans, 2001; 2002; OECD, 2001; Plantenga & Remery, 2005; Whitehouse & Zetlin, 1999), which have pointed out that public organisations do better in the WLB arrangements.



This implies that the New Zealand government is providing greater attention to good industrial relations and is providing more protection and guarantees for workers. The high cost of government intervention, increase in women participation and stronger trade unions in the public sector mean that public sectors not only have more need to provide WLB arrangements, but their capacity to do so may be larger.

In addition, since the New Zealand government emphasise the importance of gender equality and reconciliation policies (State Services Commission, 2008), the public sector is seen as being under more pressure to take gender equality norms into account to set a precedent for other companies to follow. This trend is more similar to such countries as Australia, Japan, the United Kingdom and the United States, where public sector firms are more likely to be family-friendly than private sector ones, whether in their provision of leaves, flexible hours, childcare provisions or other types of services (Evans, 2001).

Much of the policy investment in this area has been focused on drivers of productivity, including improving New Zealanders WLB and ensuring that people with family and caring responsibilities are supported to participate in the labour market, if and when they choose (Department of Labour, 2008a). WLB initiatives derived from this perspective are intended to improve both social outcomes (by enabling people to do what they want with their lives and enhancing the well-being of themselves, their families and communities) and economic outcomes (by enhancing firm productivity and in turn the overall GDP).

Although the evidence presented in this study is by no means comprehensive, this trend suggests that private companies could learn from public organisations by developing a work culture which is more conducive to WLB. This might include focusing on the reduction of employees' work-to-family conflict as a means of reducing turnover intentions, developing strategies to improve employees' control over their work arrangements and consider ways to reduce employees' work hours. Such issues can be resolved by promoting WLB issues through collective bargaining. However, even though the public-sector firms maybe offering more WLB provisions, on a mundane level, there is a perception that the bureaucratic nature of the public sector almost requires them to have a written policy on everything. As one of the HR managers in private sector suggest, 'some policies we would never bother writing down but they are a natural part of good management' (*S & T Holdings Limited*).

### **5.1.3 Type of industry and WLB**

Looking at different industries, health, education, government administration, finance and insurance sectors stand out as industries most likely to offer WLB policies.

Manufacturing, forests & logging, and gas & electricity are the least likely to offer policies. These differences suggest the various challenges each industry faces as they operate in different environments. Some industries operate in a highly competitive market; hence, they provide a hard and demanding work environment. Consistent with this assertion, previous research suggests that participation in work, reflected in work hours, is negatively related to family participation (Aldous *et al*, 1979). Therefore, the nature of the industry determines the types of WLB policies (formal and informal) which can be offered. Also, the results point out the significance of female participation, as industries with high female participation rates tend to offer more WLB initiatives.

### **5.1.4 Legislation and the provision of WLB initiatives**

The results from this study show that legislation has had a major impact on WLB provision in New Zealand. The range of government legislation addressing workplace issues for people with caring responsibilities has increased since in the past two decades. These initiatives are intended to ensure that New Zealand's workplaces are attractive, innovative and productive and that all people have opportunities to participate in well-paid and meaningful employment (particularly as women constitute the largest single group of people not participating in the labour force). As a result, addressing WLB barriers has the potential to contribute significantly to deal with employers' critical present and future challenges that New Zealand faces in lifting its economic performance and meeting skills gaps.

As the results indicate, among others, one of the major legislative changes that made significant increases in the provision of WLB initiatives is The Employment Relations (Flexible Working Arrangements) Amendment Act 2007. The increase in the provision of flexible working arrangements since 2007 suggest the employers and government's intention to retain skilled workers, and to encourage people to enter and stay in the labour market while managing multiple responsibilities at home, work, and in the community.

In the period (1998 – 2008) covered by this research study, there have been some significant shifts in the New Zealand Government's approach to enabling women, but also all carers, to optimise their participation in paid work, if and when they choose to be in the labour market. These changes in legislation have built a strong New Zealand employment relationship framework which sets minimum standards, to ensure that vulnerable workers are treated fairly and equitably.

### **5.1.5 Management, labour market and WLB**

Consistent with previous research (Bell, A., Maxwell, Ritchie, & M., 2003; Holmes, 2007; Yasbeck, 2004), the findings in this research study show that management benevolence and the labour market competition are all significant factors in the shaping of WLB policies and provisions. Management benevolence is critical in the implementing WLB policies. The growing interest and engagement from employers in WLB issues illuminates the rising demand for WLB solutions by both employees and managers. As a result, WLB is becoming a critical topic as executives and human resource professionals seek for ways to manage it. However, what could not be verified in this study is whether there was an economic motive in the implementation of WLB by organisations. An area that remains void for future research.

The labour market competition indicated a strong bearing on the organisations' intent to attract the best skilled employees. With labour market projections indicating the increasing number of employees nearing retirement age (McPherson, 2009), there is an increasing pressure on employers to become an employer of choice as competition for staff intensifies. Consequently, WLB policies offer employers a relatively cheap but efficient way of becoming an attractive employer, assisting in attraction and retention of employees.

## ***5.2 Research strengths and limitations***

The main strengths of the project include collecting data from a moderately varied and representative sample of New Zealand industries; examining the different factors that have a bearing on the inclusion of WLB policies within CEAs. The project may have benefitted from a diverse range of industries; however, a potential weakness of this study is that the sample was restricted by conditions of having submitted collective employment agreements to IRC or being listed on the New Zealand stock exchange. Secondly, only organisations that had submitted their agreements from 1998 to 2000 were selected, thereby leaving out new and small organisations. Finally, this sample was further reduced by checking the availability of financial information through published annual reports.

This topic was the first one to be conducted in New Zealand using both historic and current data. At the same time, the data and information collected from both the human resources managers and trade unions was quite exclusive. However, there was a poor response rate from HR practitioners (< 25%). This was attributed to the nature of their job, in particular the fact that they always have a hectic schedule. Secondly, the lack of responses was perpetuated by the spam filters established in most companies' email servers to capture any spamware. As a result, most survey emails were traced as spam. Also, some organisations were not willing to engage in the topic as they felt the topic was too sensitive; hence, it could trigger employment relations issues.

Other studies on WLB provision (Yasbeck, 2004) have suggested that nature of work or skills level have an influence in the provision of policies. For example, firms that employ large numbers of professionals are more inclined to initiate the implementation of WLB policies. Part of the reason for that trend is the scarcity of professionals, since they are difficult to attract and more valuable and costly to recruit and retain than less skilled workers. Evaluating the influence of skills level in the inclusion and nature of WLB policies within CEAs is an area of further research. Similarly, analysing the effects of size and age of the organisation can be valuable in assessing the prevalence of WLB policies.

## APPENDICES

Appendix One: Variable Definition

Appendix Two: Total WLB Provision/Policy Weighting

Appendix Three: Survey Questionnaire

Appendix Four: Interview Schedule

Appendix Five: Correlation Matrix

### *Appendix One: Variable Definition*

<b>Organisation Number</b>	Number allocated to each organisation in alphabetical order
<b>Organisation Name</b>	Name of organisation as listed on the NZX
<b>Annual Report Year</b>	The year in which the report was published
<b>% Return on Equity</b>	ROE calculated for that particular year
<b>Total Assets</b>	Total assets obtained for that particular year
<b>% Industry Union Density</b>	Specific industry union density for that particular year
<b>% Industry Female Participation Rate</b>	The density of women participation in the industry that the organisation belongs
<b>Type of ownership</b>	Public Organisation ( = 0) or Private Organisation (= 1)
<b>Industry Type</b>	The industry in which the organisation belongs. Industries were identified by numbers from 1 to 28
<b>Labour Market Competition</b>	Identification of whether the rationale for the implementation of the provision/policy was due to increase in labour market competition ( = 1 if the answer is yes ; 0 = if the answer in no)
<b>Management</b>	Identification of whether the rationale for the implementation of the provision/policy was due to management's good will ( = 1 if the answer is yes ; 0 = if the answer in no)
<b>Increase in Women Participation</b>	Identification of whether the rationale for the implementation of the provision/policy was due to an increase in women participation ( = 1 if the answer is yes ; 0 = if the answer in no)
<b>Trade Union Negotiation</b>	Identification of whether the rationale for the implementation of the provision/policy was due to collective bargaining ( = 1 if the answer is yes ; 0 = if the answer in no)
<b>Trade Union Negotiation - Management Response</b>	Identification of whether the rationale for the implementation of the provision/policy was due to collective bargaining and the management confirmed through the survey or interview ( = 1 if the answer is yes ; 0 = if the answer in no)

## ***Appendix Two: Total WLB Provision/Policy Weighting***

WLB provisions/policies were allocated points in accordance with the frequency in each participating organisation and specific period from 1998 to 2008.

<b>Provision/Policy</b>	<b>Frequency</b>	<b>Weighting Points</b>
Flex - Time	379	10
Job-sharing	123	6
Working from Home	74	4
Extended Leave without Pay	300	9
Top-Up Reentry Leave	278	8
Subsidised Child Care	18	1
Phased Retirement	114	5
Special Leave	810	11
Top-Up Bereavement Leave	188	7
Top-Up Parental Leave	37	3
Subsidised Exercise	19	2

## ***Appendix Three: Survey Questionnaire***

1. What is the total number of staff employed in your organisation?
2. Do you provide any work–life balance provisions outside those included in the collective employment agreement? (give some examples)

- 0 ☐. Special leave
- 1 ☐. Flexi-time (Flexible working arrangements)
- 2 ☐. Sabbatical (career-break leave)
- 3 ☐. Ability to vary hours
- 4 ☐. Job-sharing
- 5 ☐. Subsidised exercise or fitness centre
- 6 ☐. Phased retirement
- 7 ☐. Subsidised childcare
- 8 ☐. Top Up Bereavement leave
- 9 ☐. Top Up Maternity Leave
- 10 ☐. Top Up Paternity Leave
- 11 ☐. Homeworking

3. By ticking a box, please indicate when the policy was first implemented.

<b>Work-life Balance Policy</b>	<b>Date of Policy Implementation</b>				
	Before 1998	1998 - 2001	2002 - 2005	2006 -2008	After 2008
Special leave					
Flexi-time (Flexible working arrangements)					
Sabbatical (career-break leave)					
Ability to vary hours					
Job-sharing					
Subsidised exercise or fitness centre					
Subsidised childcare					
Phased retirement					
Top Up Bereavement leave					
Top Up Maternity Leave Top Up Paternity Leave Working from Home					

4. By ticking a box, please indicate whether the policy was obtained through collective employment agreement or not.

<b>Work-life Balance Policy</b>	<b>Collective Employment Agreement</b>	
	Included	Not Included
Special leave		
Flexi-time (Flexible working arrangements)		
Sabbatical (career-break leave)		
Ability to vary hours		
Job-sharing		
Subsidised exercise or fitness centre		
Subsidised childcare		
Phased retirement		
Top Up Bereavement leave		
Top Up Maternity Leave		
Top Up Paternity Leave		
Working from Home		

## ***Appendix Four: Interview Schedule***

1. Has the employer (listed in the specific collective agreement) implemented any wlb policy outside of the collective agreement? If yes, specify. Did the union promote this policy in collective bargaining before the employer acted unilaterally to implement this policy? What other factors may have led the employer to implement this policy?
2. Have agreements on WLB tended to be union or management driven –how much input/influence has the union had?
3. To what extent has legislation facilitated the campaign on WLB?



## Appendix Five: Correlation Matrix

	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26
1	1																									
2	0.005	1																								
3	-.197**	-0.069	1																							
4	-0.103	-.155*	.691**	1																						
5	.162*	-0.047	-.073*	.179**	1																					
6	-0.095	-0.096	.605**	.393**	-0.048	1																				
7	-0.064	-0.037	-.072*	-.112**	-0.017	-0.033	1																			
8	.185**	0.022	-.221**	-.183**	-0.035	-.066*	-0.024	1																		
9	0.116	-0.045	-.129**	-.194**	-0.025	-0.047	-0.017	-0.034	1																	
10	-0.045	-0.064	.351**	.488**	-0.044	-.083*	-0.03	-0.061	-0.043	1																
11	-0.054	-0.021	-.127**	-.200**	-0.025	-0.047	-0.017	-0.034	-0.024	-0.043	1															
12	-0.083	.250**	-.162**	-.159**	-0.035	-.066*	-0.024	-0.048	-0.034	-0.061	-0.034	1														
13	.156*	-0.052	-0.036	.143**	-0.03	-0.056	-0.021	-0.041	-0.029	-0.052	-0.029	-0.041	1													
14	-0.029	-0.021	-.100**	-0.011	-0.017	-0.033	-0.012	-0.024	-0.017	-0.03	-0.017	-0.024	-0.021	-0.012	1											
15	-0.009	.224**	-.111**	-.097**	-0.017	-0.033	-0.012	-0.024	-0.017	-0.03	-0.017	-0.024	-0.021	-0.012	-0.012	1										
16	-0.029	.270**	0.055	0.003	-0.002	0	0	0.002	0	0	0	0.002	0.002	0	0	1										
17	0.06	-0.007	0.04	0.003	-0.002	0	0	0.002	0	0	0	0.002	0.002	0	0	-.100**	1									
18	-0.078	-0.018	0.004	0.002	-0.002	0	0	0.002	0	0	0	0.002	0.002	0	0	-.100**	-.100**	1								
19	-0.024	0.025	0.006	0.001	-0.002	0	0	0.002	0	0	0	0.002	0.002	0	0	-.100**	-.100**	-.100**	1							
20	0.035	-0.044	0.012	-0.003	-0.002	0	0	0.002	0	0	0	0.002	0.002	0	0	-.100**	-.100**	-.100**	-.100**	1						
21	-0.033	-0.05	0.005	0.001	-0.002	0	0	0.002	0	0	0	0.002	0.002	0	0	-.100**	-.100**	-.100**	-.100**	-.100**	1					
22	0.025	-0.014	-0.029	-0.003	-0.002	0	0	0.002	0	0	0	0.002	0.002	0	0	-.100**	-.100**	-.100**	-.100**	-.100**	-.100**	1				
23	-0.049	-0.054	-0.026	-0.005	-0.002	0	0	0.002	0	0	0	0.002	0.002	0	0	-.100**	-.100**	-.100**	-.100**	-.100**	-.100**	-.100**	1			
24	0.037	-0.037	-0.025	-0.007	-0.002	0	0	0.002	0	0	0	0.002	0.002	0	0	-.100**	-.100**	-.100**	-.100**	-.100**	-.100**	-.100**	-.100**	1		
25	0.101	-0.012	-0.023	-0.001	-0.002	0	0	0.002	0	0	0	-0.016	0.002	0	0	-.100**	-.100**	-.100**	-.100**	-.100**	-.100**	-.100**	-.100**	-.100**	1	
26	-0.029	-0.048	-0.019	0.01	0.022	0.001	0	-0.015	0.001	0.001	0.001	0.002	-0.018	0	0	-.100**	-.100**	-.100**	-.100**	-.100**	-.100**	-.100**	-.100**	-.100**	-.100**	1

\*\*Correlation is significant at the 0.01 level (2-tailed); \*Correlation is significant at the 0.05 level (2-tailed).

Correlation Matrix Key	
1	%ROE
2	Total Assets
3	% Industry Union
4	% Female Participation
5	Finance, Insurance & Business Admin.
6	Education
7	Agriculture, Fishing & Forests
8	Mining & Related Services
9	Manufacturing
10	Retail, Wholesale, Restaurants & Hotels
11	Construction & Building Services
12	Energy and Utility Services
13	Health & Community Services
14	Sport and Recreation
15	Government Admin. & Defence Services
16	YEAR 2008
17	YEAR 2007
18	YEAR 2006
19	YEAR 2005
20	YEAR 2004
21	YEAR 2003
22	YEAR 2002
23	YEAR 2001
24	YEAR 2000
25	YEAR 1999
26	YEAR 1998

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