



**Strategies for Living: Moving from the
Balance Paradigm**

By

Stephen K. Hacker

and

Toni L. Doolen, PhD

Published in Career Development International

Vol. 8, No. 6, 2003

Author Details:

Stephen K. Hacker
Founding Partner, Transformation Systems International, LLC
3268 NW Melville Drive
Bend, OR 97701
hackers@performancecenter.org

Stephen serves as a board member of The Performance Center and is a founding partner of Transformation Systems International, LLC. Previously, he served as the Executive Director of The Performance Center for more than seven years, the fourth director in the 23-year history of the organization. Stephen has consulted organizations throughout the world on performance methods designed to capitalize on profound change. Clients include as diverse organizations as the Government of Botswana in Southern African, Volvo-GM Heavy Truck, Hewlett Packard, NASA, US Postal Service, American Society for Quality, Kollmorgen Technologies, Verde, and Loblaw Companies of Canada. Currently he is engaged with Bonneville Power Administration (Dept. of Energy), United Way and Oregon State Government. He has proven performance in coaching organizations and executives through each stage of transformation toward delivering results in speed to market, innovation, productivity and quality.

Toni L. Doolen, PhD
Assistant Professor
118 Covell Hall
Industrial and Manufacturing Engineering
Oregon State University
Corvallis, OR 97331-2407 USA
Toni.doolen@orst.edu

Dr. Doolen has thirteen years of industrial experience in high technology in both engineering and management. In her current role at Oregon State University as an Assistant Professor in Industrial and Manufacturing Engineering she pursues research in the areas of manufacturing and management systems. She has taught courses in the areas of human factors engineering, engineering teams and communication, and electronics manufacturing. Her research focuses on understanding the complex set of interactions between human resources, technology, and organizational processes.

Strategies for Living: Moving from the Balance Paradigm

Abstract

The secularization of lives into distinct pieces is a recent occurrence. Seeing lives as pieces, working to compose a whole, came about post-industrial revolution and mirrors how work is done within organizations. As individuals move to organize their lives in discrete areas, another system, the family, has been impacted. The need to balance these pieces of lives is often cited as today's biggest human resource management issue. The language and focus of the balance approach is limiting. A viewpoint of work and family as distinct parts of lives to be balanced keeps individuals from creating integrated lives. A shift in the view of life, family, and business is needed. An approach focused on discovering the whole person provides a pathway for radical personal growth and societal renewal. Contrary to the balance approach and the resulting suboptimization, engagement as a whole person with a conscious life's purpose creates synergistic performance.

Key Words: Work/life balance, work and family, work/life quality, human resource policies, employee satisfaction, human resource management

Introduction

The recognition that there is a relationship between the well being of workers and their contribution in the work place is not a new or revolutionary concept. In the literature there are many studies focused on establishing the relationship between a wide range of variables associated with the overall well being of workers and with the level of contribution they make to the work environment (Bond, Galinsky, & Swanberg, 1998). Some of the commonly studied variables include worker productivity, stress, absenteeism, company loyalty, product quality, and job satisfaction (IR Research Publications, 2000). Many human resource programs and organizational change efforts are focused on improving the nature of the work environment to be more supportive of workers and to provide better quality jobs. These efforts have been linked with higher job satisfaction, increased worker loyalty to the organization, and increased levels of worker commitment to the success of the organization (Bond, Galinsky, & Swanberg, 1998).

Through these research efforts human resource managers as well as line managers have come to understand that there is a relationship between the well being of the worker and business results. This realization has intensified the development of corporate policies and programs aimed at helping workers manage both their work and personal lives. There exists much passion and fervor over how to best assist workers in balancing these two seemingly opposing forces. Organizational efforts towards this end are largely focused on providing benefits, creating programs and/or establishing policies that attempt to create a supportive workplace for workers facing specific work/life issues. Companies that are recognized for their progressive, family friendly work environments often provide elder care and child care assistance benefits, employee assistance programs, and/or flexible work hour policies (Galinsky and Bond 1998). While these benefits, programs, and policies are not yet pervasive in all types or sizes of companies, they are gaining in popularity and are considered a competitive advantage by many companies.

This approach of providing mechanisms to assist employees in balancing work and family has been attributed with helping organizations achieve outstanding business results (Flynn, 1997). These approaches, however, are limited by the issue they are designed to address, i.e. work/family balance. Efforts to balance our lives have been both sub-optimal and misguided.

In a simplistic sense, promoting a concept of balance between work and family leads both managers and workers to believe that the work/family issue is nothing more than a problem solving exercise and that with the right type of benefits, policies, and programs, workers can strive to balance this simple equation. This issue must be framed in a very different manner. Rather than striving to achieve balance between work and family, workers need help in focusing first and foremost on defining a clear purpose for their lives. In other words, instead of deciding how to mix and match various pieces of their lives together, organizations will be better served by providing an infrastructure, which will enable employees to discover their purpose in life and then find ways to let all the pieces of life flow from that purpose. In other words, the organization's role is to become an enabler for an integrated view of life, rather than prescribing fixed mechanisms by which employees can balance work and family. Within this framework, the task of forming a clear and purposeful life lies within the individual employee, but is supported by the organization.

Within this paper, a new framework for visualizing relationships between various aspects of the lives of working professionals is provided. This perspective is not offered to criticize existing policies or programs, but rather to challenge the current paradigm that focuses on finding balance between family and work commitments. Dialogue surrounding broad social issues, such as this, will not necessarily enable the immediate creation of policies and implementation guidelines. However, if perspectives that challenge the current popular view are discounted, opportunities to increase understanding and to move both organizations and the individuals within the organization forward to higher levels of effectiveness will be missed. As a starting point, two metaphors are described to provide visually contrasting images of distinct ways of viewing the challenge facing working professionals today. The first is a metaphor of balance, and the second is a metaphor of soaring.

Metaphor 1: Life as a Balancing Act

Imagine several balance beams atop a pyramid shaped pedestal. Each beam is balanced, but each beam also lays in a different direction – forming a star with multiple points. The individual stands at the center of this star in a balanced position. At the end of each beam is a subject of grave importance to the individual. The subjects (family, career, health, aging parents, financial opportunities, spiritual growth, self nurturing) call out and beg the individual to move off dead center, to devote just a little more attention their way. Tempted, the individual may take a step out on one of the beams, addressing a particular life subject. Just as one foot extends the precarious balance is upset, and the whole system of priorities seems to go haywire. Balance is lost and much effort must go into restoring stability.

In living on a day-to-day basis, individuals often feel out of balance. Pushing toward accomplishment in one area in life and addressing one subject often results in a guilt-plagued mindset and with concern for other neglected areas. More importantly, however, even when life's pieces are balanced, the feeling is often unsatisfying. Somehow the adventure is lost in the emotional drain of keeping everything in balance. The sense of “going for the gold” is not present. A balanced life can feel like wet Melba toast.

Maybe it is the image of balancing life itself that contributes to the problem. Balancing does not embrace the integration life, but rather, depicts life as a set of competing pieces. These pieces struggle for our attention, with several loosing out. As a metaphor, balance is neither powerful nor empowering; the zest for life is missing in this metaphor. The fulcrum, the top of the pyramid pedestal, becomes the focal point – what a narrow road to travel upon!

Metaphor 2: Soaring in Life

A different metaphor may offer the opportunity to see the forces of life in another way. Instead of an image focused on balancing, think of soaring...possibly with the use of a parasail. The parasailing image is a bit less concrete than standing on a balancing beam and is perhaps a little more frightening. Going aloft can be seen as a leap of faith. Once airborne, the para sailor must look for updrafts to keep aloft. The force of the updrafts represents life's purpose or the reason for being. As individuals better understand and seek out their purpose in life, the energy found in the updraft takes them higher. No longer is it a fight between priorities, but rather finding in all of life's experiences (the sky as a whole), the life enhancing and purpose-fulfilling places to travel to.

In the soaring paradigm, life and all its pieces are integrated in a journey – they are not distinct steps out in a specific direction. In other words, in the soaring metaphor, it is not necessary to show up at different venues with different objectives or behavior. Rather, individuals show up to life with a clear purpose; their energy driving them toward fulfilling that purpose. This does not mean that goals and measurable accomplishments are foregone, rather, life's purpose becomes central, and changing priorities simply provide new sources of energy to drive an individual to discover how the many aspects of life are connected. The balancing act is replaced with a fuller expression of *being* through engagement in life in its many different forms. Additionally, synergy is discovered because of the integrated nature of being whole and showing up whole. Instead of pitting one objective against another, new options are revealed and sub optimization is averted.

The Limits of Balance

Organizational leaders and organizational processes are critical in helping employees move from the balance mindset. The organization's call is to facilitate workers to "get a life". *Get a Life*. This phrase, often directed at individuals who are too focused on the minutia of the immediate rather than the more important aspects of life, embodies the essence of the message calling for fully integrating all life. In other words, individuals must first get clear as to why they have a life and then the various pieces or aspects of their lives will be governed by that purpose. This can only be accomplished by moving away from the approach associated with achieving balance. The concept of balance forces individuals to think about designing a system of competing forces: those things they must do and those things they should do. This approach creates a win-lose, in other words by choosing one area of focus or attention; other areas are shorted.

For working people, with families in tow, the best-case scenario with a balancing mindset is to minimize the guilt in coming up short on either the work or the family side of the equation. Guilt becomes the lifelong price of the balance approach. Balancing becomes an optimization problem in time and scheduling. Guilt-ridden excuses are used to justify the choices made between work and family. This creates a cycle of asking forgiveness for the sub-optimal trade-off's made. In other words, because one side of the equation is always on the debit end, there is a feeling that the family, employer, or significant other have been shorted or disappointed in the effort to find balance between the competing components of life.

There is evidence that this guilt manifests itself in a real and measurable way in the work environment. A recent survey performed by CCH Incorporated (2001) found that only 32% of employees who called in sick in the past year were actually ill. The employees of the companies

surveyed were found staying home because of stress, family issues or personal needs, or because they had reached the point in our American society that they simply felt they were entitled to a day off. The cost: \$755 a year per employee. This represents a failure at work.

Similarly, this guilt also finds its way into our personal lives in a measurable way. In a 1999 study conducted by Ellen Galinsky, president of the Families and Work Institute, more than 1,000 children were asked questions about their working parents. What the children wanted was not parents that worked fewer hours, but rather parents that were less stressed and less tired from their work. Almost 35% of the children interviewed wished this for their mothers and 27.5% for their fathers. This finding may also help to explain why children, without regard to the household's current income level, wished their parents earned more money. Lack of money was seen as the primary reason that parents worked so hard and were stressed. Therefore, the perception of the children surveyed is that more money would produce a reduction in stress, fatigue and anxiety. More than 30% of children surveyed worry "often" or "very often" about their parents. This represents a failure with family.

Lastly, this guilt also shows up in the individual worker. Americans work more hours than any other industrialized nation. Americans are now averaging in excess of 2,000 hours per year, representing nearly two weeks more than the nearest competitor, Japan. The emphasis on work leads to more stress. Stress reduction, the medical field's prevention mantra of these last few decades, is virtually untouched by the current set of human resource policies aimed at improving the balance between work and family. This represents a failure with individual.

The Search for Balance

Optimizing the work of an organization is a topic that has been approached as a single variable equation in the past. Labor has been considered a variable described in terms of units of labor hours and direct and indirect labor costs. To optimize work, organizations began to focus on productivity improvement efforts directed at people in the work place, not at people in their lives. This was not a holistic approach. The outcome of this myopic line of thinking has produced some modern day dilemmas. For example, attempts to increase control and monitoring of worker performance have gone side by side with programs aimed at increasing worker self-actualization. These conflicting objectives seem to have gone largely undetected, in part, because they resulted from different human resource management practices with differing objectives.

The founder of scientific management, Fredrick Winslow Taylor (1856-1915), mastered the dissection of work into specific tasks perfected in mass production industries such as the manufacture of automobiles. Methods to achieve productivity improvements were part of the many changes accompanying the growth of businesses as large organizations steadily replaced craft industry and shops in throughout the industrial revolution. The doctrine of separating work into segments and applying defined skills and allotting time to accomplish the tasks was brilliant as well as straightforward. This same approach continues to be used today across all types of organizations. For example, FedEx employees carry an electronic tasking device and HMO's prescribe a standard course of treatment for differing ailments. The circumstances of the past in which scientific method grew have changed. In the past, job requirements were very different. Laborers were largely required to only give muscles, arms, legs and backs to do the work. This is not the reality of the workplace today.

As businesses began to re-discover that workers brought minds to work as well as their bodies, organizations began to tap into this human resource with an unparalleled zeal that only the American business model could produce. In the 1970's international competition grew rapidly by making use of the worker's problem-solving skills. Using the minds of the workforce was no longer optional. Total Quality Management became a new way of working and the need for the mind of all workers was one of the accompanying shifts in the managing of human resources.

More recently, world-class organizations have begun to talk and learn about the power of the spirit at work, too. Shortening product development cycles and increased product complexity, for example, have created a need to fully employ the minds and creativity of the entire workforce. In some business sectors this is a requirement to remain in the running from a competitive standpoint. This new requirement mandated that organizations be even more interested in the person that showed up at work. Fostering creativity without engaging the spirit is a difficult task, at best. So, organizations have responded by holding spiritual rallies of a sort at work – not so different from Sunday night revivals. With fanfare, gigantic video screens, and inspirational sermonets for organizational leaders, these rallies attempted to recharge the batteries of workers, at least for a time. When energy and enthusiasm began to wane, another pep talk or innovative payroll-check insert was offered to boost the spirits. These activities showed, to some extent, the organization's commitment to the whole labor unit, albeit only on a short-term basis, with the next Sunday night revival to engage the spirit of the individual again.

However, having focussed on the whole labor unit without the necessary regard for the whole person, high performance organizations have been created, but often at the expense of low performing families. Here is where the balancing mindset plays out. The choice has become work or family in terms of time, physical strength, mental capacity and spiritual energies. Work often wins... Workers have given this mega-system, the organization, the bulk of their attention and consciousness. Time, talent and treasure go to work, while a high dose of rhetoric is given to the family. Sacrifice is required to succeed in the balancing mindset. The effects can be seen by looking at the lives of both the youth in our high tech world and the personal lives of middle and senior managers. Business indicators such as employee turnover, unplanned absenteeism, company loyalty, and health benefit costs, indicate that the organizational record is mediocre at best. On the family side, divorce, latch key kids, the breakdown of the extended family, and stress, indicate that the family results record may not be much better. While these results can be attributed to larger societal and cultural effects, the onus for delivering higher performing families and work lives must be carried by both individuals and the working organizations they are part of.

As this dramatic shift from physical labor to employing the whole mind occurred, the approach to addressing the workforce went through little change. The pieces to the model changed, with new and improved HR plans, but the model itself did not undergo any dramatic change. From creative shift work schedules to liberalization of funeral leave policy, there has been an attempt to take into account today's family composition. In this approach each new breakdown of the work system, made visible through various labor issues, was handled by the creation of yet another new program or in many cases by the revision of existing programs. This reactive approach, while seemly effective in addressing the immediate set of issues, was not optimal from a system perspective.

Even within the area of self-improvement, solutions have been created that emphasize a compartmentalization point of view. For example, the healing of the individual is often

addressed by separating self-improvement from other life activities and processes. William Dorthery (1995) addressed this dysfunctional approach in modern psychotherapy. There has been a trend to eliminate family concerns and obligations from a moral perspective. In other words, the focus is to separate out the different parts of life and to counsel only the inner self. This approach can be seen in the “how do you feel about this” mentality that has grown in the realm of self-improvement. William Dorthery calls us to stop this foolishness and be responsible for our whole life’s creation, addressing moral obligations in psychotherapy. This point is not made to criticize the practices of psychotherapy, but to illustrate the lack of integration of the whole person in yet another domain.

The extent to which lives are seen as separate and distinct pieces can be illustrated in another way. In a survey conducted by Opinion Research International for Kimberly-Clark (1999), office workers were asked to indicate what they would most like to see more of in the office of the future. The findings indicated that office workers were searching for a higher level of integration between their work and family. For example, 27% of the workers wanted to see on-site day care, 18% wanted to have virtual offices, 10% sought an on-site fitness center and the ability to control office temperature, 8% sought concierge or on-site services, and 6% sought on-site medical care. These data share a common theme – they have little to do with work activities and a lot to do with lives outside of the working hours. People are looking to combine work with living, to have work become part of living. In a recent review of a number of surveys from a multi-billion dollar company where stress was nearing epidemic proportions, one particular written comment brought to bear another way of viewing what is happening to today’s workers. The comment was, “Work is not Life.” If work is not life then what is it -- time out from life? Has the separation viewpoint been emphasized so much that some people are no longer simply living two lives, one home life and one work life, but have progressed to the point of living a home life and a non-life? While not all workers may ascribe to this viewpoint, the implications are disturbing at best.

Soaring beyond Balance

In resolving the current problem set, organizations and its workers must look for innovative solutions to move forward in the development of the work place and of society. Instead of looking for this yet to be discovered solution, the problem definition itself needs to be challenged. Work versus family has been defined as the problem to be solved. This, the definition of the problem, is itself the issue. Instead of solving the work versus family problem, what if the whole person was considered first and foremost in all endeavors associated with human resource management? This would require a very different set of actions from those taken today.

Redefining the problem requires a shift in the model and the perspective from which leaders view their own lives and the lives of their employees. Such a shift will impact the entire range of human resource management programs, and will be a challenging shift. Ken Wilber (1996) speaks from this position when he refers to transcending the problems of today with broader perspectives and creations of tomorrow. The broader perspective needed in the attempt to find a solution to the work versus family issues is that work and family flow from the same source, a personal life and a personal life with a purpose. When an individually tailored purpose is brought to consciousness, the balance equation no longer constrains the actions of the individual. Life pieces flow from this purpose and exist in harmony, not conflicting and competing for time. In other words, both work and family flow from, towards, and throughout

the lives of individuals in keeping with their own life's purpose. The dividends of this search for life's purpose are enormous.

Finding a purpose in life is the required first step. Asking the question, "What is my life's purpose?" can be humbling and calls for courage. Often, the answers to this question are not rapidly forthcoming. However, the investment in the search will begin to yield partial answers. Refinements over time will begin to paint a clearer picture resulting in an understanding of purpose that becomes actionable. In other words, as individuals are able to refine, through life's experiences, what is core to them, life enables learning – rather than a sense of guilt or loss. It becomes possible to admit that a particular direction or decision did not have the desired result, and that a mid-course correction is needed. Just as the para sailor must adjust as winds shift, increase, or die down, the individual will see that changes, both internal and external, force adjustments to be made in the height and direction of travel. Each of these changes becomes an opportunity for reaffirming the connection between life's pieces, and the synergies between different aspects of life spring forward.

Declaring life's purpose to peers and family is the second essential step towards being able to integrate all aspects of the complicated lives of today's professional. Through declaration of one's life purpose, an individual is able to enlist family members and peers as supporters for the journey. The individual and perhaps only a few significant others may know the reasons and details for why a particular purpose is energizing. However, the explicit expression of one's life direction eliminates, in part, the need for justifying decisions and choices made, and it also enables others to become advocates for the individual.

While seeking and articulating the life purpose at the individual level is a difficult undertaking, the question for organizational leaders and managers is even more challenging. How does an organization address the search for individual life's purpose at work? It must be initiated with a different conversation beginning at the leadership level. First a leader must openly share his/her life's purpose and how that purpose determines the organizational direction being pursued by the leader. Then, instead of filling in the blanks and defining the organizational purpose for workers, leaders must take on the role of coach, helping others discover their unique purpose. Alignment of these life energies is then accomplished. Methodologies are currently being used in large organizations that follow this simple but involved course of collective consciousness toward a shared vision. The difference is letting the whole individual with all their life pieces show up to work and discover their energy directed toward a joint vision...not concentrating on manipulation to derive short term compliance.

So, how can innovative companies use this different mindset? It can be seen in the very first set of interactions between an organization and the individual -- the hiring process. "Why are you here?" becomes the key question. "What have you done," and "what qualifications do you have?" become only supporting information. This sets the stage for interactions between the worker and the organization throughout their tenure. In another realm of organizational work, strategic planning, the emphasis on plan creation and deployment must also be shifted. Strategic plans can be checked against energy for accomplishment, not just whether or not the plan is the right one. This may serve to stem the tide of failed strategies, since the reason for failure most often is not that the strategy was wrong, but that the strategy was simply not accomplished. Finding out first whether there is any commitment to accomplishing the strategy can save a lot of wasted energy and expectations. Finally, a third area that organizations can develop is the creation of work plans that become part of a more holistic life plan. Incorporating life planning as part of the business setting establishes a foundation for integration rather than separation.

Declarations of life's purpose, joy-giving experiences, and creation intentions can be shared in a very natural way, and become a guiding conversation for workers throughout the organization.

Moving Forward

Do, Have, then Be are often reflected in the progression of lives. *Doing* certain activities enables an individual to *have* desired things, resulting in the individual *being* someone. For example, a person may attend medical school in order to have a M.D., fulfilling their desire to become a doctor. The metaphor of soaring, would suggest another way of viewing the progression of lives. What about *Be, Do then Have?* What if an individual saw himself/herself as a healer and therefore, wanting to increase knowledge in the healing arts, went to medical school, which resulted in getting an M.D. The power is in fulfilling a purpose, not achievement for the sake of becoming someone. In other words, we are human beings not human doings.

Individuals often steer clear of the state of being because this state of mind begs the question, being towards what purpose? This can be a frightening thought. The absence of even a partial answer to this question by all employees in an organization leads to the conflict of balance. A phone survey of 1,006 randomly selected Americans by Yankelovich Partners (1999) captures some interesting perspectives on the search for the meaning of life. Most Americans (76%) believe that a higher being created them for a specific purpose, but only 45% of them say they understand their purpose very well. This then is the real challenge – to figure out how to get a life. Human resource managers and organizational leaders alike must find their own answer to what their live purpose is and then lead or coach others to find their answers. Viktor Frankl (1984) summarized this need in his book, Man's Search for Meaning. "Ultimately, man should not ask what the meaning of his life is, but rather he must recognize that it is he who is asked...each man is questioned by life; and he can answer to life by answering for his own life; to life he can only respond by being responsible" (p.113).

References

- Bond, J. T., Galinsky, E. and Swanberg, J. E. (1998), *The 1997 National Study of the Changing Workforce*, Families and Work Institute, New York, NY.
- CCH Incorporated (2001), *Unscheduled Absences Survey*, Riverwoods, IL.
- Dorthery, W. (1995), *Soul Searching*, Basic Books, New York, NY.
- Flynn, G. (1997), "Making a business case for balance", *Workforce* Vol. 76 Issue 3, pp 68- 75.
- Frankl, V. (1984), *Man's Search for Meaning*, Washington Square Press/Pocket Books, New York, NY.
- Galinsky, E. (1999), *Ask the Children: What America's Children Really Think about Working Parents*, William Morrow, New York, NY.
- Galinsky, E. and Bond, J. T. (1998), *The 1998 Business Work-Life Study*, Families and Work Institute, New York, NY.
- IR Research Publications (2000), "Strategic approaches to work/life balance", *Worklife Report*, Vol.13 No.1, pp. 8- 10.
- Opinion Research International for Kimberly-Clark (1999), "What workers want", *USA Today*, August 17, 1999.
- Wilbur, K. (1996), *A Brief History of Everything*, Shambhala, Boston, MA.
- Yankelovich Partners (1999), "The meaning of life", *Lutheran Brotherhood Report*, Minneapolis, MN.