

What would *you* do? An investigation into self-funded leave

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Work-life balance is a topic of great interest in contemporary career literature (Gambles, Lewis, & Rappoport, 2006; Glynn, Steinberg, & McCartney, 2002; Greenhaus & Beutell, 1985; Hall, 1990; Halpern & Murphy, 2005; Pocock, 2003). Discussions about work-life balance validate the multi-faceted lives that workers live and the difficulties that can arise when work roles displace other life roles. Neault (2005) asserted that,

Regardless of one's personal definition for balance, most people know when they are out of balance; they are constantly tired, feel as if their choices are limited, have minimal control, and are no longer able to effectively manage their lives. (p. 1)

Time spent in the worker role is often the critical variable. When an employee devotes inordinate time and energy to work, the personal resources available for the fulfillment of other life roles are correspondingly reduced. Balance becomes jeopardized. Resulting imbalance is likely to produce conflict between work and other life roles as well as an overall low quality of life (Greenhaus, Collins, & Shaw, 2003).

Time to engage in desirable or necessary life roles other than employee is an essential commodity for establishing work-life balance. Therefore, of the various strategies for addressing work-life balance, leave programs are among the most popular and potentially most effective. Leave is usually granted (and is often legislated) by an employer when events such as the birth of a child (parental leave) or the death of a close relative (bereavement leave) occur and thereby affect an employee's life roles. Another common leave option is educational leave, which is typically granted so that an employee can engage in study or training to enhance job performance. Some employers also grant unpaid leave, during which an employee does not receive a salary but is assured of return to employment at the end of the leave period. However, perhaps the most innovative and broadly appealing is self-funded leave.

A common structure for self-funded leave plans is for an employee to set aside 20% of salary for 4 years. The employer holds the salary for the employee and the programme is administered by the employer. During the 5th year, the employee takes a leave of absence and receives 80% of the most recent salary (i.e., the salary received during the 4th year). This scheme is often called the 4 for 5 plan. Another option is for an employee to set aside 20% of salary for 2 ½ years, then take a 6 month leave of absence, again at 80% salary for the term of the leave. This variant is known as a 2 for 2 ½ leave. Where self-funded leave is available, it is usually open to all full-time employees, regardless of job title or level.

Life Role Theory

Super (1976) first proposed the life-career rainbow model to comprehensively convey the structure and nature of career. Fundamental to this model was recognition that career is comprised of socially defined life roles, with worker being only one of many that a person simultaneously occupies. Other life roles that an individual may inhabit are child, student, leisurite, citizen, spouse, parent and homemaker, and pensioner. Super noted that other life roles may also be identified, although the above noted roles are highlighted on the rainbow model. Sibling, worshiper, lover, reformer, criminal are other roles that he suggested. Regardless of the specific roles and the sequence in which they appear during life, “The constellation of interacting, varying roles constitutes the career” (Super, 1980, p. 284).

Purpose of the Study

In order to examine the life roles that individuals occupy during self-funded leave plans and better understand how self-funded leave contributes to work-life balance, a study was conducted on the experiences of a group of university employees who completed either a 4 for 5 or a 2 for 2 ½ self-funded leave program.

Method

Three main research questions were of interest. Research Question 1: What were the motivations of participants for undertaking a self-funded leave and did self-funded leave fulfill the purposes of the leave? Research Question 2: How did participants use the

period of self-funded leave to pursue life roles and interests that were constrained during full-time employment? Research Question 3: What problems were experienced by participants during self-funded leave and how could they be best supported during the entire span of preparation, leave, and return to work?

Participants

Participants of this study were employees of a large urban New Zealand university who had completed a self-funded leave program. Twenty-two potential participants were identified by the university's human resources office. Of these, 16 agreed to be interviewed. Both teaching and non-teaching employees were represented. Nine of the participants held academic (teaching) contracts and 7 held administrative (non-teaching) contracts. Participants included senior lecturers, librarians, administrative staff, student services staff, and maintenance staff. Ten participants had completed the 2 for 2 ½ self-funded leave program and seven had completed the 4 for 5 program. One participant had completed both options.

Procedure

A qualitative research approach was employed. Interviews were conducted using a semi-structured interview protocol. Questions used in the interview were designed to solicit accounts of the entire self-funded leave experience, commencing with the initial decision to participate through completion of the leave and return to work. Interview notes were made during the interview and the interviews were audio recorded.

Results

Analysis of the data indicated the following findings for each research question. Research Question 1: The participants unanimously reported satisfaction with self-funded leave. A variety of motivations to enroll in the leave programs were expressed. Personal renewal was a goal for many of the participants. Participants reported "burn-out" in their position, needing a break, opportunity to reenergize their career, restore work-life balance, and reclaim career on own terms. Other participants expressed more exact goals for enrolling in the self-funded leave program. The specific purposes for the self-funded leave included traveling overseas, overseeing construction of a house, completing an

academic qualification, fulfilling a life-long goal (taking the Trans-Siberian rail journey), writing a book, previewing retirement, and immersing a young daughter in the family's native culture.

Research Question 2: Some differences in the specific goals of the participants were linked to their job in the university. Participants on teaching contracts were more likely to engage in academic pursuits such as completing a degree or writing a book or journal article. However, there were more commonalities than differences between participants on teaching contracts and non-teaching contracts. Role shifts from worker to other roles that would ordinarily compete with work roles were the over arching motivation for participating in the leave.

Research Question 3: Finances were reported as the greatest concern while participating in self-funded leave. Because self-funded leave programs require participants to contribute 20% of salary during the build up period (either 2 ½ or 4 years depending on the program option) and then receive reduced salary during the leave period itself (a further 6 or 12 months), participants faced lower salary over a significant period. Living on 80% of salary during the leave lead-up period was difficult for many of the participants. Indeed, some participants reported that they began the program and had to withdraw due to financial reasons before they eventually re-enrolled for the program and completed the leave. Having the financial resources to fulfill goals during the leave period was difficult and resulted in modifying activities during the leave period. Examples were lessening travel while on leave, or taking other employment during the leave period to meet financial obligations.

Discussion

Self-funded leave is a unique form of leave. An inherent feature of self-funded leave requires employees to commit to a relatively long period of salary contribution before the leave begins. This period of reduced salary is perhaps the most difficult aspect of self-funded leave. Yet, the great appeal of self-funded leave is that no guidelines are imposed on the employee about how leave time is to be used. Due to the time span involved and the flexibility of leave activities, planning and adaptation to changing

circumstances are more likely to be issues in self-funded leave than in other types of employer granted leave.

Conclusions and Summary

Although each participant in this study of self-funded leave uniquely used the leave time, there appears to be five thematic purposes used by the participants. Most all the participants expressed a desire to take a break for employment. Often the sentiment expressed was the need to be removed from the stress associated with full-time work. A second theme was travel. Acquiring time to travel overseas was the primary reason that many of the participants enrolled in the self-funded leave programme. A third theme was using leave time to develop or consolidate family roles. Examples of using time during leave to engage in family activities are taking care of ill relatives, caring for recently born grandchildren, traveling with children to immerse them in the family's native culture, and developing new interests with children, spouses or partners. A fourth theme was education. Some of the self-funded leave participants used the leave time to finish a formal qualification, write a book or journal articles, or develop professional relationships with overseas colleagues by visiting. The fifth theme was using leave time to achieve a long-held goal. Examples of such goals included building a house, learning a new language and in some instances, just relaxing.

The specific use of leave time was often different from what was originally planned. However, all participants used their leave time to more or less accomplish their original purpose. For many participants, unexpected activities were engaged in during the leave, but these activities did not seem to interfere with the original purpose of participating in the self-funded leave programme.

The results of this study confirm that self-funded leaves of absence are win-win situations for employers and employees. Self-funded leave provides employees with the time to achieve personal and, in some cases, professional goals. The time afforded to an employee by self-funded leave impacts the life roles of the employee and provides the means to increase the salience of roles other than worker (employee). Self-funded leave can therefore be a significant means for establishing work-life balance. Employers benefit from offering self-funded leaves by becoming employers of choice through

demonstrating concern about employee well-being. Further, the time an employee is on self-funded leave provides an opportunity for other employees to gain skills through temporarily filling the vacant role. Employees also are provided with the opportunity to trial a job role as part of their own career development.

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