

Time Is of the Essence:

New Scheduling Options for Unionized Employees



A Report from the Work in America Institute

Will Friedman, Ph. D. and Jill Casner-Lotto

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The Alfred P. Sloan Foundation**

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Copies of this report may be ordered from:

Labor Project for Working Families

2521 Channing Way, #5555

Berkeley, California 94720

Phone: (510) 643-7088

Fax: (510) 642-6432

lpwf@uclink.berkeley.edu

[HTTP://LABORPROJECT.BERKELEY.EDU](http://LABORPROJECT.BERKELEY.EDU)

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National Advisory Council

Susan Bianchi-Sand
Executive Director
United American Nurses, AFL-CIO

Donna Dolan
Director, Work/Family Issues
District 1
Communications Workers of America

Robert Drago
Professor of Labor Studies and
Industrial Relations
Pennsylvania State University

Netsy Firestein
Director
Labor Project for Working Families

Thomas A. Flanigan
Senior Manager, Union Relations
DaimlerChrysler Corporation

Lonnie Golden
Associate Professor of Economics
Pennsylvania State University

General Holiefield
Administrative Assistant
United Automobile Workers/
DaimlerChrysler Department

Jeff Horne
Director, Labor Relations
Kraft Foods

Deborah King
Executive Director
1199 Employee Training &
Job Security Programs
Service Employees
International Union

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Communications Workers of America

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Plant Manager
Miller Brewing Corporation

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Regional Administrator
Department of Labor, Women's Bureau

Jack Navarro
Vice President, Labor Relations
Verizon Communications

Carolyn York
formerly Associate Director
American Federation of State,
County, and Municipal Employees

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Executive Summary

1. The Time Squeeze

Time is a significant issue for a significant number of unionized employees, for some being on an equal footing with money. If high-quality reduced-work schedules were more widely available to them, the vast majority of unionized employees say they would be likely to take advantage of them at some point in their lives.

Moreover, a significant number—perhaps about a quarter—would likely take advantage of them right now, considerably more than the approximately 11% who currently work part time. Of those, many would, if they could, opt for cutting their schedules by only 10% or 20%. Those with the strongest interest in working less than full time are younger workers, women, and those who work in dysfunctional work cultures.

2. The Status Quo

About 23% of unionized workers have part-time options that they consider high in quality—i.e., with decent wages, benefits, and job security. At first glance, this percentage correlates well with the approximately one-quarter of unionized workers that we surmised in section 1 to be strongly interested in working less. However, only 14% are able to reduce their schedules by 10% or 20%, which is what most workers who want to work less would prefer to do. Moreover, while women and younger workers tend to find part-time options that they describe as high in quality, this does not hold true for those in dysfunctional work environments, who have fewer part-time options to begin with, and fewer still that they would characterize as high in quality. Currently, workers, union leaders, and managers agree that creating new scheduling options is low on the change agenda—if, indeed, it is on it at all. But workers, especially, would like to see significantly more attention paid to it.

3. Benefits of New Scheduling Options

Most employees, union leaders, and managers agree that a greater variety of scheduling options is likely to help employees better manage their work/life issues and raise worker morale. There is also substantial agreement that more scheduling options can attract and keep quality workers and help reduce unscheduled absences.

An important disagreement exists between union members and union leaders on whether pushing for more scheduling options is likely to help unions attract and retain members. A generation gap between union leaders and younger union members may help account for this disagreement. Many are pessimistic on the question of whether more scheduling options would help minimize layoffs—however, as large numbers admit to not being sure about this, strong evidence could be persuasive. Health and retirement benefits are a complicating factor, in that reducing them to coincide with reduced schedules attracts managers while making union leaders wary. Finally, union leaders and managers agree that in a climate of tight budgets, non-wage benefits, such as new scheduling options, are especially worth considering.

4. Drawbacks of New Scheduling Options and Core Concerns

Most employees, union leaders, and managers feel that new scheduling options can create certain problems, such as difficulties in juggling schedules and managing the workload. When confronted with the prospect of creating new scheduling options, employees tend to worry most about the burden of getting more work done in less time on the job. Union leaders tend to worry that management will take advantage of changes in the status quo to subvert gains they have achieved. And managers tend to worry most about administrative headaches that might develop in a system with more scheduling options. Managers and union leaders share a resistance to change in that both tend to point the finger, each accusing the other of rigidity and unwillingness to develop new ideas.

5. Creating New Scheduling Options for Unionized Employees: Examples and Prospects

Four specific strategies to give employees more control of their time and opportunities to reduce their schedules are explored in terms of their availability, desirability, and feasibility. Overall, considerably more workers say they would “seriously consider” using an option than have it available. But supply is tracking demand in the sense that the type of scheduling option that employees are most attracted to are also the ones that are most frequently available. Finally, the feasibility of incorporating reduced-time options into the workplace appears to be a major sticking point, in that workers, union leaders, and managers alike view them as difficult to put in place.

6. Guidelines for Practitioners

The research suggests that those interested in creating reduced-time options in unionized workplaces ought to keep the following guidelines in mind: First, begin with measures that provoke the least resistance among workers, union leaders, and managers. Second, start with pilot projects. Third, communicate the benefits and address core concerns. Finally, build carefully on initial success, paying careful attention to the concerns and preferences of all major stakeholders.

Appendix 1: Examples from the Field of Reduced-Time Initiatives

Nine real-life examples of reduced-time options (eight in unionized settings) are described and analyzed.

Introduction

EXPLORING ALTERNATIVES TO MAX-TIME FOR UNIONIZED EMPLOYEES

Americans spend a great deal of time at work—more, in fact, than workers in almost every industrialized nation. There is nothing wrong with such industriousness, but some people, especially during certain periods in their lives, may wish to invest less of their time at work and more of it elsewhere. Family, friends, leisure, personal and spiritual growth, community involvement, often health itself are compressed into ill-fitting compartments of free time—and sometimes distorted in the process.

“In the last contract they gave us a raise but expanded our hours. What did we gain? Nothing.”

Union member, New Jersey

Yet American work is so structured that it can be hard to get off the fast track of high stress and long hours, even for a while. For many Americans, jobs appear to be either max-time positions (often demanding more than a forty-hour week) or else limited, low-quality part-time positions, which pay poorly and offer little in the way of benefits and job security. (See, for example, Jeffrey Wenger’s 2001 paper for the Economic Policy Institute, “The Continuing Problems with Part-Time Jobs.”)

This project asks if there are creative alternatives that could:

- serve the needs of unionized employees who may wish to work less than full time and yet have a decent job,
- respond to the economic and business needs of employers, and
- be beneficial to unions.

For example, if, as our data suggest, new scheduling options might help organizations attract and retain quality workers, help unions attract new and younger members, and generally raise morale, these sorts of measures could benefit more than the individual worker. They could be advantageous to the organizations that represent workers and the ones that hire them as well.

The project thus looks for what might exist between the two extremes of max-time and poor-quality part-time options, and how these alternatives to the status quo might or might not serve the needs of all concerned. It explores the possibilities for creating a greater variety of scheduling options for unionized employees. Are such options desirable? Are they practical? What would be the major obstacles? Where are the richest opportunities? What might they look like in practice? These are some of the questions the study set out to answer.

All studies have boundaries, and this one focuses primarily on unionized employees (although many of its findings undoubtedly apply to the American workplace in general). We focus on unionized employees because they remain a significant (even if shrinking) portion of the American workforce, which has been little studied with regard to issues of work/life balance. Moreover, workplace innovations that become embedded in unionized workplaces have often influenced practices in the larger, nonunion sector as well.

RESEARCH STRATEGIES

Despite our generalization that too little exists between max-time and poor part-time positions, there are real-life examples of alternatives—and not just in Europe, where France has adopted the 35-hour week and others have experimented with a variety of approaches to reduced work time. Even in the case of the often overworked American—and, moreover, even in the case of the supposedly less flexible unionized setting—there are significant examples of innovative scheduling approaches that offer alternatives to full-time employment—as described in the case vignettes in appendix 1.

While these case examples add an important dimension to our inquiry, this study primarily employs the tools of opinion research to explore the availability, desirability, and feasibility of possible alternatives to conventional work

schedules for unionized employees. The research incorporated several components, beginning with focus groups, conducted with unionized employees, local union leaders, and managers in Detroit, Los Angeles, New Jersey, New York, and Boston. Nine focus groups took place prior to the survey to aid in its design, and four were conducted afterward to explore the research's implications.

Phone surveys were conducted with 601 unionized employees (also referred to as "unionized workers" or "union members" throughout the report). This sample, which comprises the core of the research, has a margin of error of plus or minus four percentage points. Because a national random sample of unionized employees would not have been cost effective, we drew a random sample from the 13 most densely unionized states. (These are New York, Hawaii, Michigan, Washington, New Jersey, Alaska, Nevada, Minnesota, Connecticut, Wisconsin, Illinois, Ohio, and California.) Technically speaking, the survey results speak precisely to the views of unionized employees in those 13 states. But as this sample accounts for 60% of all the unionized employees in the United States, and as it netted results from a very wide range of regions, industries, and occupations, we are confident that it provides a reasonably good reading of the views of America's unionized employees overall.

To provide comparisons with the unionized employee data, a phone survey was conducted with 214 nonunion employees (from a random national sample), as well as mail surveys that netted responses from 181 local union leaders and 124 managers. Of the latter, 59 manage unionized employees specifically. As this report focuses primarily on the unionized workplace, we have restricted our reporting of managers' data only to those who work with unionized employees. Because this is a relatively small group of respondents, the managers' results should be viewed as suggestive, and not definitive.

Further details on methodology may be found in appendix 2. Readers should note that the percentages reported in the text or tables may not add up to 100, either because some data (such as "don't know" responses) were left aside for the sake of simplicity of presentation, or due to rounding. The complete phone survey instrument, along with overall responses of both unionized and nonunionized employees, may be found in appendix 3.

Section One: The Time Squeeze

Time is a significant issue for a significant number of unionized employees, for some being on an equal footing with money. If high-quality reduced-work schedules were more widely available to them, the vast majority of unionized employees say they would be likely to take advantage of them at some point in their lives. Moreover, a significant number—perhaps about a quarter—would likely take advantage of them right now, considerably higher than the approximately 11% who currently work part time. Many would, if they could, opt for cutting their schedules by only 10% or 20%. Those with the strongest interest in working less than full time are younger workers, women, and those who work in dysfunctional work cultures.

THE TIME SQUEEZE IS A SIGNIFICANT PROBLEM FOR A SIGNIFICANT NUMBER OF UNIONIZED WORKERS

If money is tight these days, so is time, and for some, our data suggest, the latter is an equal or even bigger problem. For example, whereas 31% of unionized employees say “making too little money” is their biggest work-related issue, almost as many (29%) say “having too little time for . . . personal and family life.” Indeed, our data suggest that around a quarter of the unionized workforce might well reduce their schedules today if (and this caveat is at the center of this study) “high-quality” reduced-time options were available to them.¹

By high quality we mean scheduling options that allow workers to cut back their time on the job without incurring severe disadvantages with respect to income, benefits, or job security. That said, it is important to note that we did not ask about pie-in-the-sky scenarios, in which people would incur *no* disadvantages while still being able to work less—who wouldn’t want that? Rather, we asked people to assume there would be some proportionate reduction in wages and benefits, just not profound ones. Even so, a good number of people appeared to be strongly interested.

For example, we asked about a system in which workers, on a voluntary and planned basis, could “work 90% of a full-time schedule for 90% of wages and 90% of benefits, 80% of a full-time schedule for 80% of wages and 80% of benefits, and so on, through 70%, 60%, etc.” Only 14% of unionized employees report having something along these lines available in their workplace today. But of those who do, 38% say they are using them or have done so at some point.

What about the large majority who do not have this option? Thirty percent of them say that if they *did* have it, they “would seriously consider using it” at this point in their life. Likewise, in a more general question, about a third (33%) said that if they had more

high-quality part-time options of any sort available to them, they would be likely “to use them and reduce [their] schedule.”

Moreover, beyond the quarter or so of unionized employees who appear to be seriously interested in some form of reduced-time options, the vast majority of those who are not interested at the moment still agree that shorter work hours could be useful in the future. Seventy-seven percent agree that “having a greater variety of scheduling options available to me could be a big help at certain points in my life.”

“I went out on stress last year when I had several deaths in the family. When I came back, my job was threatened.”

Union member, Los Angeles

“It’s good to have some time off. I’m not for working six to seven days a week and outrageous hours—then all you’re doing is working for the sake of working.”

Union member, Detroit

NOT ALL OR NOTHING

Less-than-full-time scheduling options, where they exist, usually mean working half time or less. Still, it was the idea of cutting back just a little bit that was attractive to many people. When full-time employees are asked which schedule they would choose today if they were free to do so, 70% said their current work schedule. Sixteen percent opted for 90% of their current time, wages, and benefits. And another seven percent chose 80% of their current time, wages, and benefits, followed by many fewer numbers opting for working—and earning—less. In other words, many unionized workers (close to a quarter, according to this survey item) would rather work just a little less.

WHY SOME WORKERS WANT TO WORK LESS

While people had a variety of reasons for working less than full time, the most commonly cited had to do with family issues. For example, we asked those currently working part time why they had chosen to do so. Thirty-eight percent made comments concerning child care, family time, caring for sick or needy family or friends, and the like.

We also asked full-time workers who expressed a strong interest in reducing their schedule why they would make that choice. Many again made comments about spending more time with family, friends, and children (about 30%). Another 20% also mentioned an interest in finding ways to earn additional income, such as working a second job or starting a business.²

WHO ESPECIALLY WANTS TO WORK LESS

Of course, not all unionized employees have an equal desire to take advantage of reduced-time options, even “high-quality” ones. Who, then, is most eager for these options? Generally speaking, they fall into one or more of the following categories: young, female, and those employed in tension-filled workplaces, where trust is low and labor tensions are high.

Young Workers

When we began our research we expected that age might be a significant variable in two ways. We thought the combination of fewer responsibilities and greater wanderlust might attract younger workers to reduced-time scheduling options. We also wondered if older

workers might be especially interested—this time in order to wind down their working lives and ease toward retirement in stages. The data in our sample of unionized workers suggest that our hunch was right about younger workers, but not about older workers—who appear determined to work as much as they can as long as they can.³

“We had a vacation buyback option—they could get more vacation by giving up pay. The Generation X workers all wanted that. Of the older folks, none opted for it.”

Manager, Boston

Thus, in a number of instances, younger workers expressed significantly greater enthusiasm for reduced-time options in comparison to their older colleagues. For example, close to half (45%) of those between the ages of 18 and 34 say they would be likely to use high-quality part-time options if more were available to them. In contrast, only about a third (32%) of those 55 and over would do so (with other age groups coming out somewhere in between). Similarly, twice as many younger workers (23%) as older ones (11%) would opt to drop down to a 90% work schedule, with proportionately lower wages and benefits. And whereas 34% of those 18-34 say too little time is their biggest work-related problem, only about 22% of those 55 and older agree—again, with other age groups coming out in the middle.

Figure 1-A

Suppose you could choose among the following work schedules. Which would you probably select at this point in your life?

	Total	18-34	35-44	45-54	55 and older
90% schedule, pay, benefits	16%	23%	15%	18%	11%
80%	7%	5%	9%	6%	7%
70%	2%	2%	1%	3%	3%
60%	1%	1%	1%	1%	1%
50%	1%	-	1%	1%	3%

Respondents: Unionized workers (n = 601)

Women

Whereas only 4% of male union members in our sample were working part time, 19% of women were doing so, indicating that female employees have a particular need to work less than full time. Alternatively, it could mean that women have a harder time finding full-time positions.⁴ In any event, more women than men (39% vs. 30% respectively—a small but statistically significant gap) say they would be likely to take advantage of it if they “had more high-quality part-time options available to [them] right now.”

Those Employed in Tension-Filled Workplaces

A finding that we had not thought to look for at the outset of our research was that workers in uncomfortable, dysfunctional workplaces are more likely to want to work fewer hours. (“Dysfunctional workplaces” in this instance are places that workers say have “mostly adversarial” labor-management relations and/or where they “mostly mistrust” management.) There appear to be two interrelated reasons why workers in these environments would rather work less. One is that these are unpleasant places in which to spend one’s time. The other is that these workplaces tend to have fewer opportunities for working less than full time. Both are discussed below.

Employees want to avoid tense work environments.

Forty-two percent of unionized employees who say they “mostly distrust” management also say they would be

likely to reduce their hours if they “had more high-quality part-time options available.” In contrast, only 30% of those who “mostly trust” management would do so.

Similarly, 51% of those who describe labor relations as “adversarial” say they would seriously consider using an option where they could adjust their schedule at different times of the year “to fit both [their] own and the organization’s needs.” In contrast, only 36% of those who say their labor relations are “cooperative” would seriously consider using such a system. There were similar findings for other innovations that give workers options for reducing their time at work.

If it is true that employees of dysfunctional workplaces are likely to want to work less in order to remove themselves from unpleasant environments, then the reverse ought to be true as well—i.e., workers in positive environments should be more likely to want to come to work. And this is exactly what we found when we asked respondents how close the following proposition is to their own views: “The main reason I’m *not* interested in part-time options is because I like being at work so much.” Forty-four percent of workers who describe their labor relations as “cooperative” say this statement is “somewhat” or “very close” to their own view, but only 28% who describe their labor relations as “adversarial” respond similarly. (The same pattern shows up when comparing workers who “mostly trust” or “mostly distrust” management.”)

Figure 1-B

If you had more high-quality part-time options available to you right now, how likely do you think you would be to use them and reduce your schedule?

	Workers' Views of Labor Relations	
	Mostly Trust	Mostly Distrust
Very likely/ Somewhat likely	30%	42%
Not too likely/ Not at all likely	62%	52%

Respondents: Full-time unionized workers (n = 527)

Figure 1-C

[If you had the option to adjust your schedule at different times of the year] do you think you would seriously consider using it at this point in your life, or not?

	Workers' Views of Labor Relations	
	Mostly Cooperative	Mostly Adversarial
Yes	36%	51%
No	58%	45%

Respondents: Unionized workers (n = 601)

Those in the “healthier” work cultures, in other words, tend to like spending time at work, while those in more “dysfunctional” workplaces would rather have more free time for other pursuits.

Fewer part-time opportunities in dysfunctional workplaces.

The above findings are, we believe, intuitively reasonable. As one manager put it in a focus group, “Sure, if work is unpleasant, you’re not going to want to spend your time there.” But there is another factor that might also be at work: Employees in dysfunctional environments are also *less likely to have reduced-time options available* to them. For example, 36% of those who say they “mostly trust” management have part-time options available to them, compared to only 24% of those who “mostly distrust” management.

Thus, a reason there are more people in dysfunctional workplaces who want to work less might be simply because these options are less frequently available than they are in healthier workplaces. And the result of that is likely to be a situation in which people who would want to work part time in *any* environment are trapped. In other words, you would expect to have relatively more people saying they want to work less in any environment in which there are relatively fewer opportunities to do so.

In sum, it is likely that the combination of a tense environment and few opportunities to get away from it is driving the demand in these situations for more reduced-time options.

Do reduced-time options make for healthier workplaces?

One final speculation (and it is not more than that) might be considered. We’ve suggested that people in dysfunctional work environments are more likely to want to work a reduced schedule for two reasons. First,

because they want to get away from an unpleasant situation. And second, because these environments tend to have few reduced-time options in the first place, so people who would want to work part time in even a happy workplace are trapped.

But if it is the case that where there is mistrust and antagonistic labor relations, there are few part-time options, it is also the case that where there are few part-time options, there tends to be less trust and more antagonistic labor relations. In other words, the correlation goes both ways.

Could it be that the availability of a variety of employee scheduling options is one key to a healthier work environment? This may sound far-fetched at first. But, as we will see in section 3, workers did clearly tell us that, in their view, a benefit of creating new reduced time scheduling options is to “raise worker morale” and “attract quality workers,” among other things. So it appears at least possible that having a variety of scheduling options available to workers could contribute to the overall health of the workplace. (Again, this should only be viewed as a hypothesis raised by the research.)

WHAT WE DID NOT FIND

While common sense tells us that single parents feel the time squeeze more than many others, the data did not show respondents in this category clamoring harder for more “high-quality part-time options.” (For example, whereas 28% of single parents said they were likely to work less than full time if “more high-quality part-time options” were available to them, 34% of those who are single and without children say that *they* are likely to do so.) The reason for this, we hypothesize, is that economic need and insecurity make it difficult for single parents to consider working less—even if time with the kids is at a premium.

Section Two: The Status Quo

About 23% of unionized workers have part-time options that they consider high in quality—i.e., with decent wages, benefits, and job security. At first glance, this percentage correlates well with the approximately one-quarter of unionized workers that we surmised in section 1 to be strongly interested in working less. However, only 14% are able to reduce their schedules by 10% or 20%, which is what most workers who want to work less would prefer to do. Moreover, while women and younger workers tend to find part-time options that they describe as high in quality, this does not hold true for those in dysfunctional work environments, who have fewer part-time options to begin with, and fewer still that they would characterize as high in quality. Currently, workers, union leaders, and managers agree that creating new scheduling options is low on the change agenda—if, indeed, it is on it at all. But workers, especially, would like to see significantly more attention paid to it.

This section examines the prevalence and quality of part-time scheduling options in today's unionized workplaces, who is taking advantage of them, and how people view the importance of creating more of them. The remainder of the report concentrates on the prospects for creating new reduced-time options for unionized employees.

"Part-time positions . . . are paid significantly less per hour than people doing comparable work in full-time jobs. They're not considered real employees—they have this lower status, even though they may be there for years."

Union leader, Los Angeles

ARE THERE ENOUGH HIGH-QUALITY PART-TIME OPTIONS TO MEET THE DEMAND?

Thirty-nine percent of full-time unionized employees have access to some form of part-time scheduling option.⁵ Our study, however, looks beyond the simple availability of part-time options and attempts to wrestle with their quality. One way we did this was by asking respondents this question:

Different kinds of workplaces have different kinds of part-time options. Which of the following statements best describes the part-time options in your workplace?

Poor-quality part-time options, with low pay and little or no benefits and job security?

Or, *high-quality part-time options, with good pay, benefits, and job security?*

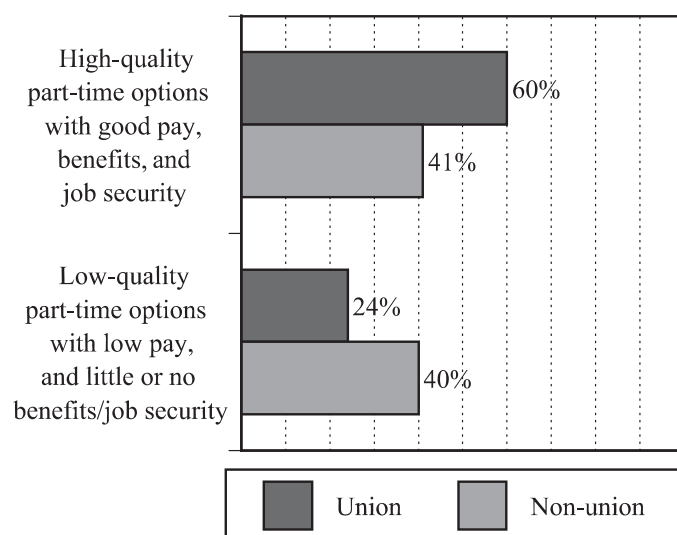
What we found in response to this question was that 60% of unionized employees with part-time options

characterized them as "high quality." By contrast, only 41% of our nonunion comparison group rated their part-time options as "high quality."

But even if unionized workers tend to have more satisfactory part-time options than nonunion workers, how well does the supply of reduced-time options match the demand in the unionized workplace? Overall, about 23% of unionized workers have opportunities to reduce their work schedules that they describe as "high quality." (If 39% of unionized work-

Figure 2-A

Different workplaces have different kinds of part-time options. Which of the following statements best describes the part-time options in your workplace?



Respondents: Unionized workers with part-time options (n = 228); nonunionized workers with part-time options (n = 119)

ers have part-time options of any kind, and 60% of this group then goes on to rate their part-time options as “high quality,” the result overall is 23% with high-quality options.) If we are right in our estimate (in section 1) that somewhere around a quarter of unionized workers are seriously interested in reducing their schedule at least a little, then it appears that the supply of quality part-time options is generally in line with demand.

On the Other Hand

Two important caveats accompany the generalization that the supply of quality reduced-scheduling options correlates fairly well with the demand. First, as we saw in section 1, many workers are particularly interested in working just a little less than full time—specifically, 23% were interested in working either 90% or 80% of a full-time schedule. But the ability to shave just a little time off of full time is rarely available. In fact, only 14% of unionized employees report having “an option similar to this” in their workplace (more on this in section 5).

The second caveat is that for some employees—those in “dysfunctional” workplaces, in particular—the gap between the desire to work less and having good opportunities to do so is quite significant. We elaborate on this point below.

WOMEN AND YOUNGER UNIONIZED WORKERS TEND TO FIND QUALITY PART-TIME OPTIONS, BUT THOSE IN DYSFUNCTIONAL WORKPLACES DO NOT

In the last section we saw that women and young people were among those unionized workers most interested in working a reduced schedule. It turns out that both of these groups are also more likely to feel that they have found decent opportunities to do so. Thus 66% of women who have part-time options rate them as “high quality,” compared to 52% of men. Similarly, 66% of younger workers (ages 18-34) who have part-time options rate them as “high quality,” compared to 58% of those age 55 and over—not a huge difference, but in the direction of matching the resource with the need.

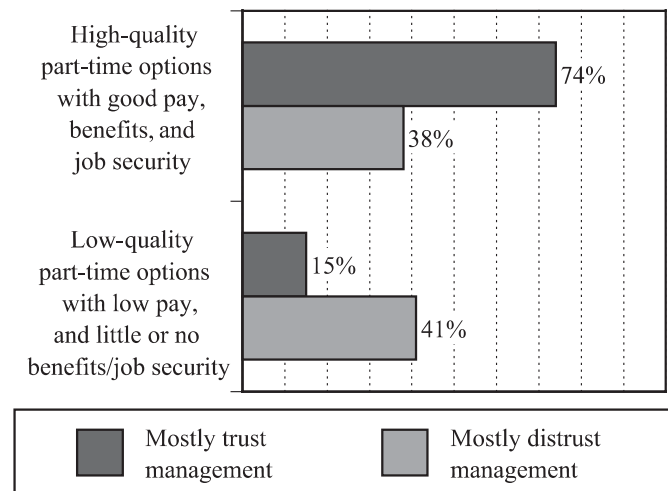
In Dysfunctional Workplaces, the Supply of Quality Part-Time Options Lags Behind Demand

However, for the third group—unionized employees in what we termed dysfunctional workplaces—a very different pattern emerges. While (as we saw in section 1) those in dysfunctional environments especially want to work less, they are relatively unlikely to have, first of all, any option for doing so, and, secondly, any particularly good options.

For example, among unionized employees who have part-time options available to them, almost three quarters (74%) who say they “mostly trust” management also say their part time scheduling options are “high quality.” In strong contrast, only 38% of those who distrust management rate their part-time options as high quality—a rather substantial gap. Similarly 70% of those with part-time options, who also describe their labor relations as “cooperative,” rate their part-time options as high quality. In contrast, 50% with “adversarial” labor relations do the same.

Figure 2-B

Different workplaces have different kinds of part-time options. Which of the following statements best describes the part-time options in your workplace?



Respondents: Unionized workers with part-time options (n = 228)

The outcome is that, for those in dysfunctional workplaces, the gap between the desire to work less and the ability to do so is relatively large. Thus, only 15% of workers who “mostly distrust” management say they have “high-quality” options available to them. But 42% of these same workers say that “if more high-quality part-time options were available . . . right now,” they would be “likely” to take advantage of them.

SHOULD THE STATUS QUO CHANGE?

So far we’ve examined the status quo with regard to the part-time options available to unionized workers. The next question is, should the status quo change? One way we explored this question was by first asking unionized employees and union leaders where they thought creating new options is on their union’s agenda, and then, where they thought it should be.

Union Members and Leaders Agree That New Scheduling Options Are Low on the Union's Agenda, but Disagree on How High They Should Be

Sixty-four percent of employees say “offering a greater variety of scheduling options for employees” is currently either “near the bottom” of the union agenda or not on it at all. Turning from union members (i.e., employees) to union leaders, we find 77% also say new scheduling options are currently either near the bottom or not on the agenda at all—thus confirming the perception of the majority of employees.

A greater contrast comes when asking where creating more scheduling options should be on the agenda. When union members are asked, we find that almost two-thirds (65%) would like to see new scheduling options farther up the ladder of priorities—that is, either “in the middle” (40%) or “near the top” (25%).

In contrast, only 38% of union leaders in our survey would place creating new scheduling options “in the middle” or “near the top” of the union’s agenda. And in contrast to the 25% of employees who specifically say “near the top,” only 8% of union leaders agree.

“Unions must bring this to the table. People’s lives are not constant. Things happen, and having those options would make it easier for the employee.”

Union member, Los Angeles

“I definitely think [reduced-scheduling options] should be on the union agenda. It’s been an issue for years, and now it’s very important in light of this economy. Flexibility, work hours, scheduling benefits—this is something people want.”

Union member, Los Angeles

It is also the case that if union leaders are not nearly as enthusiastic as are employees about moving the creation of new scheduling options to the upper half of the union’s agenda, many do, at least, seem to recognize it as an issue of some importance. This is indicated by the finding that whereas more than half of union leaders (55%) say new scheduling options are currently off the agenda altogether, only 29% feel this is the way things ought to be.

Figure 2-C

<i>Currently, where would you say offering a greater variety of scheduling options for employees is on your union's agenda?</i>			
	Unionized workers	Union leaders	Managers
Near the top	9%	3%	9%
In the middle	21%	17%	18%
Near the bottom	23%	22%	35%
Not on the agenda at all	41%	55%	35%
<i>In your view, where should it be on the union's agenda?</i>			
	Unionized workers	Union leaders	Managers
Near the top	25%	8%	14%
In the middle	40%	30%	35%
Near the bottom	14%	24%	35%
Not on the agenda at all	15%	29%	11%

Note: Managers were asked: “Currently, where would you say creating a greater variety of scheduling options for nonmanagerial workers is on your organization's agenda?” Respondents: Unionized workers (n = 601); union leaders (n = 181); managers of unionized workers (n = 59)

"[Scheduling] should be on the agenda. The question is, where on the agenda? It's not necessarily a universal value—some may want it, some may not. Unions tend to do better on issues on which everybody can agree, like coverage, pensions, wages. But obviously we [also] need to work on issues that are not universal.

Union leader, Los Angeles

What Do Managers Think?

One qualification before we present data from our managers' survey: As noted in the Introduction, because the mail survey of managers resulted in fewer responses than we would have liked, these results should be considered suggestive, not definitive. That said, our data suggest that the views of managers of unionized employees are somewhere between those of unionized employees and union leaders as to the priority they place on creating new scheduling options for workers.

Managers were asked a two-part question similar to the one asked of employees and union leaders. Here, though, it asked where creating new scheduling options ought to be on their organization's (not the "union's") agenda.

Managers agree with employees and union leaders that scheduling options are currently a low-priority item. But when asked whether this should continue to be the case, they come out in between employees and union leaders.

In sum, a solid majority of unionized employees (65%) think scheduling options should be "in the middle" or "near the top" of the change agenda, followed by 49% of managers and 38% of union leaders. (See figure 2-C.)

The gaps between employees, union leaders, and managers as to the priority they place on creating new scheduling options likely has much to do with how each group views the pros and cons of such a project. The next two sections explore precisely this question.

"I could see [reduced-time options] working in my business for selected jobs, but not all."

Manager, Boston

"It's certainly something to look at."

Manager, New York City

Section Three: Benefits of New Scheduling Options

Most employees, union leaders, and managers agree that a greater variety of scheduling options is likely to help employees better manage their work/life issues and raise worker morale. There is also substantial agreement that more scheduling options can attract and keep quality workers and help reduce unscheduled absences. An important disagreement exists between union members and union leaders on whether pushing for more scheduling options is likely to help unions attract and retain members. A generation gap between union leaders and many younger union members may help account for this disagreement. Many are pessimistic on the question of whether more scheduling options would help minimize layoffs—however, as large numbers admit to not being sure about this, strong evidence could be persuasive. Health and retirement benefits are a complicating factor, in that reducing them to coincide with reduced schedules attracts managers while making union leaders wary. Finally, union leaders and managers agree that in a climate of tight budgets, nonwage benefits, such as new scheduling options, are especially worth considering.

Sections 1 and 2 show that a significant number of unionized employees would be interested in opportunities for new scheduling options, including those that would allow them to reduce their work schedules. We can further explore the prospects for creating new scheduling options by understanding how people view the pros and cons of these options. This section examines the benefits people associate with new scheduling options, and the next one addresses perceived drawbacks and resistances.

LIKELY POSITIVE IMPACTS OF NEW SCHEDULING OPTIONS

“Each employee likes to have a little bit more control over his life. And when he’s got a little extra control, he becomes more predictable, more reliable, and more productive.”

Union leader, New Jersey

When asked about the positive effects of creating more scheduling options—including, in many instances, reduced-time options specifically—we found general agreement among employees, union leaders, and managers on several important points.

As figure 3-A (on page 12) shows, strong majorities in all three groups agree that new options would help employees with work/life issues and raise morale.

Managers also tend to agree with workers that more options are likely to help their organization attract quality hires. (Whereas 50% of managers agree that this is likely, only 21% said it was unlikely. Another 30% are just not sure.) And a majority of union leaders agree with employees that additional scheduling options could help reduce unscheduled absences.

WILL SCHEDULING OPTIONS HELP THE UNION ATTRACT AND KEEP MEMBERS?

Agreement breaks down between union members and union leaders on whether or not a greater variety of scheduling options would be likely to “help the union attract and keep members.” As this would seem to be a key item insofar as the union’s stake in the issue is concerned, we will discuss it further.

As figure 3-A shows, only 28% of union leaders say it is “likely” that more options would help the union attract and keep members, while 46% say “not likely.” In strong contrast, 62% of unionized employees think it is likely that new scheduling options would help the union attract and keep members. It is worth noting, however, that while few union leaders feel it is likely that new scheduling options would attract new union members, about as many (25%) admit that they are “not sure” on this question—and therefore may be presumed to be relatively open minded.

A Generation Gap?

Why the discrepancy between the perceptions of leaders and members on this question? The age factor may be a large part of it. Significantly for the growth of unions, the view that more scheduling options would help the union attract and keep members is strongest among younger workers, where a full 70% say it is likely that more scheduling options would help the union keep and attract members.

In light of this finding, it is important to note that over half (57%) of union leaders who responded to our survey are over the age of 45 and only 2% are in their twenties. So a generation gap may, in part, explain why union leadership appears to view the issue differently from members, as it is the younger workers who feel

most strongly about having more scheduling options. Note though that if this generation gap exists, it could be operating in two ways. First, it could be the case that leaders, being mostly of another generation, are out of touch with the needs and desires of younger workers and do not appreciate the importance of this issue to their younger current and potential constituents. Second, it might be the case that leaders are aware of these preferences, but simply think it is a bad idea to pursue more scheduling options, and that younger workers are being naive about the dangers posed by opening this Pandora's box. In either case, large discrepancies in the views of union leaders and members—especially younger ones—on these matters may well be important from the standpoint of the union's future.⁶

WOULD REDUCED-TIME OPTIONS HELP MINIMIZE LAYOFFS?

In addition to whatever other benefits they may offer, a major incentive to develop reduced-time options, espe-

cially in a difficult economy, is as a strategy to minimize layoffs. The logic here is that if more people are voluntarily working fewer hours, organizational costs are reduced and layoffs can be minimized. The case illustrations in appendix 1 will show that some practition-

"[Voluntary reductions of work schedules] could be beneficial. Rather than laying off, we would not lose the knowledge employees have, and we'd save money in training."

Manager, New York City

[New scheduling options] could be healthy. I don't want to have anyone [who gets laid off] leave the union. And it also sounds like a win-win [for unions and management], getting the best of both worlds. Instead of losing people and then having to hire new people, [management] would save the costs of training.

Union leader, New Jersey

Figure 3-A

If employees had a greater variety of scheduling options available to them, do you think it is likely or unlikely it would:

<i>Percentage saying it is "likely" more scheduling options would:</i>	Unionized workers	Union leaders	Managers
Help employees balance their work and personal lives better	79%	59%	76%
Improve worker morale	72%	59%	64%
Help your employer attract and keep quality workers	68%	n/a	50%
Reduce unscheduled absences	64%	53%	43%
Help the union attract and keep members	62%	28%	n/a
Make it easier to match people's hours to the organization's needs during busy and slow periods	59%	44%	35%

Note: Question wording slightly different for union leaders and managers. Respondents:

Unionized workers (n = 601); union leaders (n = 181); managers of unionized workers (n = 59)

ers currently using with reduced-time options believe things are working out in just this way. The survey results, however, indicate that most people are unsure that this logic holds up in reality.

Forty-one percent of unionized employees do agree that it is likely that “more high-quality part-time options . . . would help the organization minimize layoffs by encouraging people to reduce their hours and earnings during a business slowdown.” On the other hand, a virtually equal number (38%) do not think this likely. Managers and union leaders, meanwhile, are even less likely to accept this line of thinking.

It is important to note that, as with a number of items we’ve examined, the “not sure” responses are substantial, indicating that if strong evidence were to show that layoffs can, indeed, be avoided by offering reduced-time options, people might well be persuaded. Opinion, in other words, does not appear to us to be in a very hardened state on this question, or on a number of others surrounding these issues.

Employee Benefits a Complicating Factor

The question of employee benefits greatly complicates the issues surrounding reduced-time scheduling options. A core dynamic we encountered in the study is

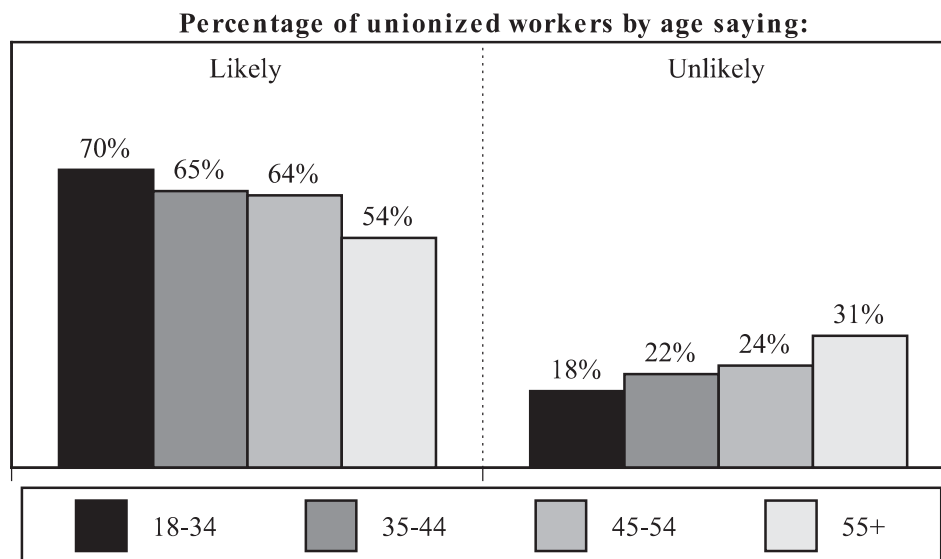
that proportionally reducing benefits to coincide with reduced schedules is an item that, on the one hand, helps bring managers to the table, but on the other, drives union leaders away.

Some light was shed on management thinking during a focus group conducted in Boston. Most did not seem to feel that reduced-time options would help reduce the need for layoffs. Then one manager said he was particularly attracted to a scheduling system that would offer employees the ability to work 90% of a full-time schedule for 90% of wages and 90% of benefits, through 80%, 70%, and so on. As this manager from the Boston area put it, “That can save money because it cuts benefits. And that is where you get the bang for your buck.” Most of the group, upon hearing his reasoning, seemed to agree with him. One added, “We used to have something called ‘vacation optional.’ That did work out—it helped management reduce expenses, and it gave employees some flexibility.”

However, union leaders are leery of any system, even a voluntary one, that creates norms of lowered benefits. As a union leader in Detroit put it, “We’ve fought hard for benefits. I don’t want to throw that back.” The critical importance of the issue was made clear by a New Jersey union leader who noted, “There are people in my

Figure 3-B

If employees had a greater variety of scheduling options, do you think it is likely or unlikely it would help the union attract and keep members?



Respondents: Unionized workers (n = 601)

office who are almost 80 years old and working only for the health insurance.”

WOULD REDUCED-TIME SCHEDULING OPTIONS HELP ORGANIZATIONS MANAGE WORK FLOW MORE EFFECTIVELY?

In many situations, work ebbs and flows with market demands and other factors, so that staffing levels can be spread too thin at one time and become redundant at another. This raises the question of whether a greater variety of scheduling options, including reduced-time options, might make it possible to better match staffing needs with people’s preferences, by making it easier for people to voluntarily take extra time off during slow periods. While a majority of employees (59%) see this as a viable concept, substantially fewer union leaders (44%) and managers (35%) agreed.

The skepticism of managers in this regard should not be discounted, as managing work flow is one of their prime tasks. On the other hand, employees, because they are so close to the practical realities of the work, sometimes see things more clearly than others, so this idea should probably be viewed as at least a possibility in some kinds of work environments.

A SHARED BENEFIT: A POTENTIAL WIN-WIN IN A TIME OF TIGHT BUDGETS

Pay is what we work for, but what can we do to improve the quality of life in our work? All we focus on is compensation, but the increases are so marginal. We’ve got to get out of that paradigm.

Unionized employee, Los Angeles

Strong majorities of both union leaders and managers agree that scheduling innovations are a way to offer employees something in lieu of wage increases in a period of belt tightening. Specifically, 67% of our manager respondents said it was very or somewhat close to their views that “in a climate of tight budgets, it makes sense to look at new nonwage benefits you can offer employees, such as a greater variety of scheduling options.” In a very similar question, 56% of union leaders said it was very or somewhat close to their views that “in a climate of tight budgets, it makes sense to consider new gains you can win for employees besides wages, such as a greater variety of scheduling options.”

Figure 3-C

<i>In a climate of tight budgets, it makes sense to look at new nonwage benefits you can offer employees such as a greater variety of scheduling options. How close is that to your own views?</i>	
	Managers
Very close/Somewhat close	67%
Not too close/Not at all close	26%
<i>In a climate of tight budgets, it makes sense to consider new gains you can win for employees besides wages, such as a greater variety of scheduling options. How close is that to your own views?</i>	
	Union leaders
Very close/Somewhat close	56%
Not too close/Not at all close	38%

Respondents: Managers of unionized workers (n = 59); union leaders (n = 181)

Section Four: Drawbacks of New Scheduling Options and Core Concerns

Most employees, union leaders, and managers feel that new scheduling options can create certain problems, such as difficulties in juggling schedules and managing the workload. When confronted with the prospect of creating new scheduling options, employees tend to worry most about the burden of getting more work done in less time on the job. Union leaders tend to worry that management will take advantage of changes in the status quo to subvert gains they have achieved. And managers tend to worry most about administrative headaches that might develop in a system with more scheduling options. Managers and union leaders share a resistance to change in that both tend to point the finger, each accusing the other of rigidity and unwillingness to develop new ideas.

LIKELY NEGATIVE IMPACTS OF MORE SCHEDULING OPTIONS

In section 3 we examined people's perceptions of the benefits of new scheduling options, including reduced-time options; in this one we examine the drawbacks. We asked each group of respondents about some of the likely negative impacts, several of which are captured in figure 4-A.

Employees, union leaders, and managers essentially agree on the most likely problematic effects of creating new scheduling options. Two items are clearly of highest concern across the groups. The first is that more scheduling options would "create confusion trying to coordinate people's schedules." Employees, union leaders, and especially managers, all worry that that would be the case.

Figure 4-A

If employees had a greater variety of scheduling options available to them, do you think it is likely or unlikely it would:

<i>Percentage saying it is "likely" more scheduling options would:</i>	Unionized workers	Union leaders	Managers
Create confusion trying to coordinate people's schedules	65%	71%	79%
Create problems for full-timers who might end up having to carry a bigger load if more people choose to work part time	51%	65%	72%
Lower work quality because part-time workers might be worse at their jobs than full-time workers	37%	44%	31%

Note: Question wording slightly different for union leaders and managers. Respondents:

Unionized workers (n = 601); union leaders (n = 181); managers of unionized workers (n = 59)

The other high-consensus issue involves those who do not take advantage of reduced-time scheduling options. Significant majorities of union leaders and managers, along with a slight majority of workers, judge it likely that more scheduling options would lead to “problems for full-time workers, who might end up having to carry a bigger load if more people choose to work part time.”

There is much less concern about one other potential drawback of creating more reduced-time options. Most do not believe that work quality will suffer because part-time workers are less competent than their full-time counterparts.

WORKERS' CORE CONCERN: LESS TIME DOES NOT EQUAL LESS WORK

The data also reveal what we consider to be the top one or two areas of resistance on the part of each of these three groups—employees, union leaders, and managers—to the creation of reduced-time scheduling options, concerns that will have to be worked through if such options are to become more of a reality.

One of the main concerns on the part of workers stems from their perception that when work time is reduced, workload stays the same. For instance, employees were asked how close the following statement was to their own views: “If I were to work fewer hours, I’d still end up having to do the same workload.” Sixty-four percent said this was close to their views (with 47% saying “very close” and another 17% saying “somewhat”). A very similar 60% of part-time employees say the same thing, leading one to conclude that this is more than a hypothetical conjecture; it is probably pretty much the truth of the matter.

The problem of managing the workload came through in another way. As we saw earlier (in fig. 4-A), a slight majority of employees think new reduced-time options could be problematic for those who do not take advantage of them, because it is assumed that they will end up with more work.

“[Reduced schedules] will put more work on other people. That’s a big no-no. That would be the reason it wouldn’t fly.”

Unionized employee, Detroit

So employees worry that, on the one hand, those who work fewer hours will have to squeeze more work into less time, while on the other, those who maintain a full-time schedule will have to do the same. On one level these two findings appear to be contradictory, in that if part-time workers are maintaining their workload, full-time workers should not be faced with major problems of having more to do. It is therefore possible that one of these concerns is a false impression. It might also be the case, however, that new scheduling options can result in workload problems for both those who take advantage of them and those who do not, at least if the programs are poorly managed.

UNION LEADERS' CORE CONCERN: TODAY'S OPTION IS TOMORROW'S REQUIREMENT

Perhaps the main reason many union leaders are less than eager to get involved in scheduling innovations is a general distrust of management. Put another way, union leaders do not consider their position to be strong enough to ensure that new initiatives will, in fact, work out to the advantage of the union and its members. This came across strongly in our focus groups, where many union leaders seemed to feel that changing how work is scheduled could open up a Pandora’s box. A few, however, did feel that if the union is strong and careful enough, it is possible to experiment with these sorts of innovations.

In light of such comments, it came as no shock when 50% of union leaders in our mail survey said more scheduling options would probably end up being a disadvantage for the union because they would be exploited by employers. In contrast, 32% said that more scheduling options would end up being an advantage for employees by giving them more choices.

“If you open it up as a voluntary policy, management will shove it down your throat.”

Union leader, Detroit

“Management is always going to try to keep the upper hand. But if you have a really strong union, and as long as it’s optional, it’s fine. [Then] management can’t abuse it. We fought for alternative workweeks. When we won, the worker loved us. And we also had to fight against [options becoming mandatory], and we won there too.”

Union leader, Los Angeles

Figure 4-B

Generally speaking, do you [union leaders] think creating a greater variety of scheduling options would:

End up being a disadvantage for most of the employees you represent because it would be used solely as a cost-cutting strategy and exploited by management?	50%
OR	
End up being an advantage for most of the employees you represent by giving them more options that can help them balance their work and personal lives?	32%
Not sure	17%

Respondents: Union leaders (n = 181)

Most employees would not be surprised by this finding. When asked why some union leaders might resist the creation of new scheduling options, 36% say union leaders would “be afraid management would exploit the change in some way,” while another 27% say union leaders would “feel it might weaken the union in some way.”

MANAGERS' CORE CONCERN: WILL THIS BE MORE OF A HEADACHE THAN IT'S WORTH?

As we saw earlier, a major concern for most managers is that more scheduling options are likely to create confusion (fig. 4-A), and this appears to be at the core of managers' resistance to these ideas. For instance, in addition to the 79% of managers who worry about creating confusion, 59% also worry that new scheduling options could lead to “too many worker or union demands.”

Earlier we saw that workers were astute judges of their union leaders' likely anxieties, and the same holds true here with respect to management. Sixty-five percent of employees say that “management would be more likely to resist” than support “the idea of offering a greater variety of scheduling options for employees.” When asked why, 52% say: “They'd see it as too much of an administrative headache.” By contrast, only 16% said their managers would resist because “they'd see it as too costly,” and many fewer came up with other reasons.

“Companies are cutting so many people that if somebody leaves for three weeks, who's going to do their work? That just wouldn't work at my company.”

Manager, Detroit

“We did try some job sharing, and to be honest, it was a flop. Although employees appreciated the flexibility, it was a mess for management. Whenever you needed something, the one not on the job that day was the one who had it.”

Manager, Boston

It's true that we did run into some “can-do” type of managers, who were not intimidated in the least by the logistical challenges of managing reduced-work schedules. For example, a manager for city workers in Los Angeles explained: “We're pretty flexible, with a variety of scheduling options. It works great with my folks. There are no problems as long as I make sure I have good coverage.” Along these lines, a strong majority (71%) of managers surveyed said it was “very” or “somewhat” close to their views that “if you plan ahead, it's possible to create more scheduling options without creating a lot of administrative headaches.” This question seemed to bring out the competitive best in the managers we surveyed. But even so, in the natural course of events, we would expect managers to resist the creation of new scheduling options, based on their concern that they would be a nuisance to administer.

A SHARED RESISTANCE: IT'S THE OTHER GUY WHO MAKES IT HARD TO TRY SOMETHING NEW, NOT ME!

Union leaders and managers tend, in the natural scheme of things, to be on different sides of the fence on a number of issues. This can lead, unfortunately, to a degree of mistrust and a kind of finger pointing that amounts, in our view, to a shared resistance to trying something new.

This phenomenon was on display in our survey, in that 70% of managers say that it is close to their view that “if the unions were less rigid about work rules, it would be a lot easier to put things like new scheduling options in place.” But about the same percentage of union leaders (64%) said it is close to their view that “if managers were more open to experimentation, it would be a lot easier to put things like new scheduling options in place.”

Section Five: Creating New Scheduling Options for Unionized Employees: Examples and Prospects

Four specific strategies to give employees more control of their time and opportunities to reduce their schedules are explored in terms of their availability, desirability, and feasibility. Overall, considerably more workers say they would “seriously consider” using an option than have it available. But supply is tracking demand in the sense that the type of scheduling option that employees are most attracted to are also the ones that are most frequently available. Finally, the feasibility of incorporating reduced-time options into the workplace appears to be a major sticking point, in that workers, union leaders, and managers alike view them as difficult to put in place.

In this section we explore what the research suggests about the possibilities of creating new reduced-time options for unionized employees. Many of these points will be illustrated through case examples (collected in appendix 1) of actual programs where reduced-time scheduling options have been put in place to better serve the needs of employees—while also keeping the best interests of the union and the employer in mind.

WHAT REDUCED-TIME INNOVATIONS ARE AVAILABLE TO WORKERS NOW?

In our survey, we asked about four innovative strategies for offering reduced-time options. Specifically, we asked workers for their reactions to:

- Incremental/Proportional Reductions. “The option to adjust your schedule so you could work 90% of a full-time schedule for 90% of wages and 90% of benefits, 80% of a full-time schedule for 80% of wages and 80% of benefits, and so on through 70%, 60%, etc.”
- Paid-Time-Off Banks. “Being able to combine vacation days, sick days, personal days, and holidays into one category of paid time-off days, and you could use these for any purpose you wish as long as you schedule it in advance.”⁷
- Variable Part-Year Schedules. “Being able to adjust your schedule at different times of the year to fit both your own and the organization’s needs. For example, you might work a reduced schedule during part of the year and a full-time schedule the rest of the year.”
- Unpaid Time Off with Lost Pay Spread Over the Year. “The option to take extra time off without pay, beyond paid vacation days, and have the lost pay

“I think that anyone going out to work should have these [scheduling] options. I think you’ll get more from an employee when you give them the hours they need or want.”

Unionized employee, Detroit

spread across the whole year’s paychecks to help you afford it.”

We found, first of all, that each of these measures is available in at least some workplaces—and some in quite a few. We found as well that where they are available, they appear to be popular, and where they are not available, many would like it if they were (fig. 5-A, page 20).

SUPPLY AND DEMAND

Overall, there are clearly more workers showing strong interest in scheduling options than have it available to them. For example, whereas 50% would “seriously consider using” the option labeled “Unpaid time off with lost pay spread over the year,” only 29% have that option available to them.

On the other hand, it is striking that the measures that seem to have the greatest allure for workers (based on fig. 5-A, column 3) are also the ones that are most prevalent (fig. 5-A, column 1). That is, the item that most people say they would “seriously consider using” if it were available is also the one that, relatively speaking, is most frequently available to unionized employees, and so on, through the second, third, and fourth items. Supply thus seems, in this sense, to be tracking demand—although demand still is out ahead of supply. Put differently, it appears that company policies are moving haltingly in the direction of employee desires.

Figure 5-A
Availability and Usage of Reduced-Time Options

	Do you have an option similar to this where you work, or not?	Have you ever used this option, or not?	If this option were available, would you seriously consider using it at this point in your life, or not?
<u>Paid-time-off banks:</u>	Percentage of unionized workers saying yes:		
Combining vacations days, sick days, personal days, and holidays into one category of paid time off days . . .	44%	80%	66%
<u>Unpaid time off with lost pay spread over the year:</u>			
Taking extra time off without pay, beyond vacation or personal days, and have the lost pay spread across the whole year's paychecks to help people afford it	29%	49%	50%
<u>Variable part-year schedules:</u>			
Creating different schedules at different times of the year to fit both the employee's own and the organization's needs	25%	72%	43%
<u>Incremental/proportional reductions:</u>			
You could work 90% of a full-time schedule for 90% of wages and 90% of benefits, 80% of a full-time schedule for 80% of wages and 80% of benefits, etc.	14%	38%	30%

Respondents: Unionized workers (n = 601)

THE YEAR AS UNIT OF ANALYSIS: HARD TO IMAGINE BUT EASY TO USE?

Another interesting pattern in figure 5-A concerns what we are terming “variable part-year schedules”—i.e., treating the year as the unit of analysis, rather than the day or week. This system turns out to be extremely popular where it is in place. A quarter of our respondents said they have something along these lines available to them, and an impressive 72% of those workers are taking advantage of it.

But this is not, it turns out, the most popular notion to those who do not currently have it as an option.

Returning to figure 5-A, this program comes in toward the bottom of those that workers say they “would seriously consider using” if it were available. (Note, however, that this is only a relative point, concerning how this measure compares to some of the others. It is still the case that a substantial 43% indicate they might well use this option if they could.) Perhaps this is the kind of measure that is hard for many people to imagine—it doesn’t necessarily strike most of them as something they would find useful if they haven’t thought about it much. But once in place, many people seem to find it useful.

WHAT DO UNION LEADERS AND MANAGERS THINK?

Some light can be shed on the prospects for expanding on these sorts of reduced-time options by adding the views of labor leaders and managers to our discussion.

We asked if each of the four measures in figure 5-A is something that the union (in the case of union leaders) or the organization (in the case of managers)

- “probably ought to support,”
- “probably ought to explore through research and pilot projects,” or

- “probably ought to avoid.”

As figure 5-B shows, significant numbers of union leaders and managers are open to either supporting or experimenting with these sorts of ideas. There are also quite significant numbers who—especially with regard to specific reduced-time strategies—would just as soon avoid them altogether.

Union leaders appear most hesitant about getting involved with scheduling systems that (1) would allow workers to change the amount of time they work during different times of the year, or (2) would allow for incremental decreases in work time, along with proportional

Figure 5-B
Union Leaders and Managers on Reduced-Time Options

	Union leaders who say the union probably ought to:			Managers who say their organization probably ought to:		
	Support	Explore	Avoid	Support	Explore	Avoid
<u>Paid-time-off banks:</u>						
Combining vacations days, sick days, personal days, and holidays into one category of paid time off days . . .	32%	34%	28%	33%	35%	24%
<u>Unpaid time off with lost pay spread over the year:</u>						
Taking extra time off without pay, beyond vacation or personal days, and have the lost pay spread across the whole year's paychecks to help people afford it	23%	37%	28%	19%	16%	60%
<u>Variable part-year schedules:</u>						
Creating different schedules at different times of the year to fit both the employee's own and the organization's needs	18%	25%	48%	21%	28%	42%
<u>Incremental/proportional reductions:</u>						
You could work 90% of a full-time schedule for 90% of wages and 90% of benefits, 80% of a full-time schedule for 80% of wages and 80% of benefits, etc.	11%	33%	47%	19%	30%	32%

Respondents: Union leaders (n = 181); managers of unionized workers (n = 59)

decreases in wages and benefits (90%, 80%, etc.). Based again on survey data, focus groups, and conversations in meetings, our best guess is that the main issue here is that union leaders worry that these sorts of measures, even if they begin as voluntary options, could create new norms and opportunities through which management could curtail hours or benefits more generally (see section 4).

Our manager respondents, meanwhile, appear to be particularly nervous about the idea of providing workers the opportunity to take extra time off and spread the lost pay over the year's paychecks. Again, based on the survey evidence enumerated in section 4, as well as focus groups and meetings where these ideas were discussed, the main worries probably have to do with the anticipated headaches from juggling schedules and maintaining adequate coverage. As one manager in a focus group put it in response to this idea: "It would definitely be beneficial to families, no doubt. But it seems like a bookkeeping nightmare."

WHERE IS THE GREATEST COMFORT LEVEL?

Focusing in particular on those who say they would "support" these ideas outright, or would at least be interested in "exploring" them through research and pilot projects, allows us to see where the clearest sailing could be found for those wishing to create such options. As figure 5-B shows, one idea, the paid-time-off-bank, has a good number of people in all three groups saying that they would either support it outright or be willing to "explore" it through research and pilot projects. As described in the next section, this is the sort

of idea that can provide a good starting point for expanding the options available to unionized employees. The other ideas are more of a mixed bag, although each enjoys significant levels of either outright "support" or at least willingness to "explore," certainly enough to get a conversation going on its possibilities.

FEASIBILITY A POTENTIAL STICKING POINT

If we decide a reduced-time scheduling option is a worthwhile idea, how hard would it be to put it in place? Figure 5-C displays the data generated by a question each group was asked about how difficult it would be to implement each of the four scheduling innovations discussed here. Note that we made a point of asking how easy or hard it would be to put each one in place, *assuming that the organization wanted to do it*. In this way we tried to focus on the nuts-and-bolts practical challenges of making these sorts of ideas a reality, and to keep aside the problem of getting an organization to sign on in the first place.

It becomes apparent rather quickly that none of these groups consider any of these measures to be a walk in the park to implement—especially once we get beyond the first item, which is the least dramatic proposal for helping employees gain more control of their time. This suggests that feasibility is a very real issue for those who wish to see employees gain more scheduling options, making it all the more important to develop them with great care. How that can best be accomplished is our topic in the final section of the report.

Figure 5-C

If your organization wanted to implement this option, do you think it would be relatively easy or relatively hard?

	Unionized workers who say it would be "hard"	Union leaders who say it would be "hard"	Managers who say it would be "hard"
<u>Paid-time-off banks:</u>			
Combining vacations days, sick days, personal days, and holidays into one category of paid time off days . . .	58%	37%	54%
<u>Unpaid time off with lost pay spread over the year:</u>			
Taking extra time off without pay, beyond vacation or personal days, and have the lost pay spread across the whole year's paychecks to help people afford it	57%	56%	64%
<u>Variable part-year schedules:</u>			
Creating different schedules at different times of the year to fit both the employee's own and the organization's needs	72%	58%	71%
<u>Incremental/proportional reductions:</u>			
You could work 90% of a full-time schedule for 90% of wages and 90% of benefits, 80% of a full-time schedule for 80% of wages and 80% of benefits, etc.	68%	64%	61%

Note: Question wording slightly varies for union employees, union leaders and union managers

Respondents: Unionized workers (n = 601); union leaders (n = 181); managers of unionized workers (n = 59)

Section Six: Guidelines for Practitioners

The research suggests that those interested in creating reduced-time options in unionized workplaces ought to keep the following guidelines in mind: First, begin with measures that provoke the least resistance among workers, union leaders, and managers. Second, start with pilot projects. Third, communicate the benefits and address core concerns. Finally, build carefully on initial success, paying careful attention to the concerns and preferences of all major stakeholders.

The survey data reviewed in section 5 offer perspectives on the kinds of scheduling innovations that are currently in practice, their prevalence, and the prospects for introducing them into new workplaces. The case examples in appendix 1 show in some detail how reduced-time options in unionized workplaces are playing out in workplaces today. For those so inclined, this, the final section, draws on the research to offer guidelines for developing new reduced-time options for unionized employees in a given workplace.

1. Begin with measures that are relatively desirable and noncontroversial in the eyes of workers, union leaders, and managers alike.

While the survey gives general data about people's preferences and concerns regarding reduced-time scheduling options, these are not all the measures that might be considered. Moreover, the survey speaks only to how people in general react to these ideas—in a given workplace circumstances could well be different. Therefore, in each workplace that might be contemplating the development of new reduced-time options, an initial exploration ought to be conducted on how different stakeholders view different strategies, to find out what this unique set of workers, union leaders, and managers thinks would make the most sense.

"Job sharing would work for us. If I have four nurses willing to work for the same amount of pay, and all are agreeable to it, they could see more patients."

—Manager, New Jersey

Once change agents have a reading on the levels of support and resistance that exist for a range of possibilities, they can begin by focusing on a reduced-time option that enjoys a measure of initial support. In this way they will start building positive momentum and, with any luck, the trust that will be invaluable in expanding on initial efforts.

2. Unless a measure is supported by a strong consensus, it is probably best to begin with pilot projects rather than full-scale implementation.

In section 5 we noted that feasibility is a real issue. At the very least there is a strong and widespread perception that, even if an organization wanted to do it, reduced-time options are relatively difficult to put in place. As this judgment is widely shared by employees, union leaders, and managers alike, we suspect there is a good deal of truth to it.

We also saw, in our questions to managers and union leaders, that more are open to "exploring" these ideas through "research and pilot projects" than are ready to line up and support them outright (fig. 5-B). In that these ideas are somewhat daunting to all involved, it is wise in most cases to begin with a pilot project rather than a full-scale implementation. The recommendation, in other words, is to test and perfect a reduced-time option in a controlled situation and then build on modest successes, rather than risk the failure of the whole venture. Starting with a pilot project seems to offer the best chance to deal with the dual and interrelated problems of resistance and practical difficulties.

A concrete question comes into play here: Could union locals experiment with pilots on their own initiative, or would such an effort have to begin with the union's national/international head office? Only 22% of union leaders say that if they wanted to create reduced-time options, it could "only be worked out" nationally. Another 27% say it could be worked out locally, with some national involvement, while a plurality of 38% say it could be worked out "locally."

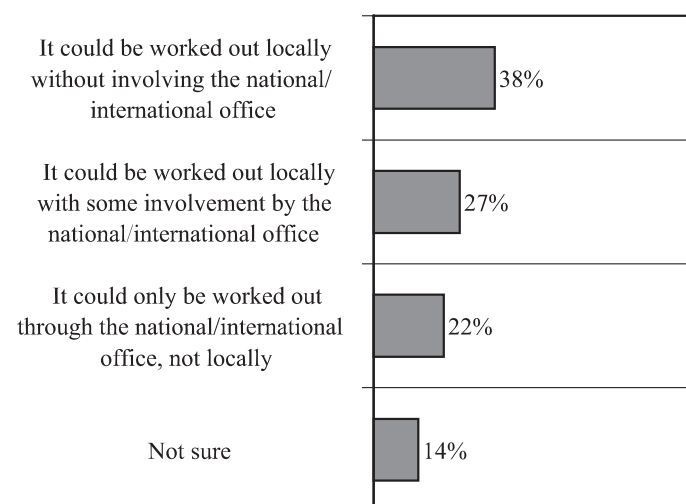
3. Create buy-in by (a) communicating the benefits of reduced-time options and (b) addressing the core concerns of union leaders, managers, and workers.

a. Communicate the benefits.

Every effort to change how things are done involves a communications campaign of some kind, and developing new scheduling options for unionized employees is no different. In section 3, the survey identifies a

Figure 6-A

Suppose for a moment you [union leaders] wanted to see a greater variety of scheduling options available to the workers you represent. If that were the case, would you say:



Respondents: Union leaders (n = 181)

number of areas in which most people agree that reduced-time options will provide benefits. While these will be applicable in most workplaces, others may have their own variations on these themes, which should be explored. Whatever these perceived benefits turn out to be, emphasizing them will help create buy-in for new scheduling options. (See the case examples in appendix 1 for examples of the benefits associated with reduced-time scheduling options in a variety of settings.)

For example, as we saw in section 3, it is pretty clear to most workers, employers, and managers that reduced-time options will help workers to better manage and balance their work/life issues, as well as raise worker morale, attract quality hires to the organization, and reduce unscheduled absences. These are, of course, only the benefits we chose to ask about. In a particular industry and workplace other virtues may be apparent that are also worth noting by those advocating for new, reduced-time options.

Although few union leaders in our survey bought it, the fact that union members, especially younger ones, believe these options could help the union attract new

members might also be an important part of the conversation. And remember that most managers and union leaders alike responded favorably to the argument that “in a climate of tight budgets, it makes sense to look at the new nonwage benefits you can offer employees, such as a greater variety of scheduling options” (see section 3 for details).

The term “conversation” used above is intentional. In our estimation, dialogue and deliberation on these issues are needed, in that opinions are not hardened and many would benefit by simply having an opportunity to consider them. One reason we say this is because of the large numbers of “not sure” responses we often received when asking about the pros and cons of introducing new scheduling options into the workplaces. These results suggest that people have not spent much time thinking about, let alone experimenting with, these ideas.

A second reason we say this is because of our experience in conducting the focus groups for this study. It was striking how often participants, whether employees, union leaders, or managers, first reacted to these ideas with skepticism and resistance, and then warmed up to them after a period of batting around the ideas. A number of people experienced a 180 degree turnaround, scowling at the mention of these concepts early on and then endorsing them warmly toward the end, with comments like, “Sure, that would give people real control over their lives!” Experimentation, research, and dialogue would thus seem to be in order to help all involved work through the uncertainties they associate with this topic.

b. Address core concerns.

Core concerns, such as those identified in section 4 for union leaders, managers, and employees, should be addressed early on. For union leaders as well as many employees, a large part of reducing core concerns will mean taking care to respect the processes and protocols of labor-management relations. For example, most employees say it is very (57%) or somewhat (22%) close to their own views that they would “only be comfortable creating a greater variety of scheduling options if it were clearly negotiated in our contract.” An even larger majority of union leaders say it is very (65%) or somewhat (17%) close to their views that they would only be comfortable if reduced-time options were “clearly negotiated” into the labor contract.⁸

"[Reduced schedules] could work for so many people, but we must build in protections, set parameters. For example, maybe no more than 10% of the workforce [would use these options]—we want to avoid creating only part-time workers."

Union leader, New Jersey

"Unions in general would be much more willing to agree to innovative plans if the union trusts management. When I don't trust somebody, I don't innovate."

Union leader, New Jersey

Addressing the resistance of managers will require dealing with the practical hurdles of maintaining productivity and seeing that managers' jobs are not made hopelessly complex. As less than a third of our managerial respondents (31%) say they have received "any training or other support for managing part-time workers," professional development could help managers cope as well.

Moreover, because reduced-time options will require creative solutions to the practical challenges they present, processes that augment formal bargaining might be especially useful, such as prebargaining sessions that prepare for formal bargaining, and cross-functional (and, ideally, labor-management) teams that devise solutions designed to address these sorts of issues.⁹

4. Build on initial successes by applying pilot programs more widely or by creating new ones.

Once a successful pilot is put in place, the question is how to build on it. As there is no single recipe for successfully "scaling up" a pilot initiative, this becomes a challenge each organization must tackle for itself. Practitioners might consider making the pilot an organization-wide policy, expand it more selectively to particular units that are interested in applying it, or creating additional pilots to bring new options to the organization, perhaps leading toward a menu from which different units and different employees can choose.

"Within our local, we are partners with the employer. If they want to make a move, they sit down with us to discuss it. [As a result] we have no big problems, only little ones. We don't fight; we discuss, and negotiate back and forth."

Union member, Detroit

"If you don't win people's respect, you've got nothing. But if you spend time with them, you don't have to draw a line in the sand; they will trust you."

Manager, Boston

In considering these various paths for expanding on initial pilot ventures, we end our guidelines with the same point with which we began this section, and which underlies the entire project: Practitioners will do well to pay careful attention to the preferences and concerns of employees, union leaders, and managers, who will surely offer important guideposts as to how to proceed.

Notes

1. The one-quarter figure is a rough estimate based on responses to a variety of survey questions, many of which are reported on in the text in this and other sections of the report. This figure, however, should not be viewed as a firm prediction of behavior—many factors intervene between the preferences expressed on a survey and manifest behavior in everyday life. Rather, the estimate is a general indication of the scope of serious interest on the part of unionized employees.
2. Interestingly, nonunion employees seem more likely than unionized workers to work less in order to pursue educational opportunities. In the survey, 28% of part-time nonunion workers mentioned education as the reason they chose to work part time, as against only 7% of unionized employees. This is, of course, the type of item that will differ by field and industry. For example, in our focus groups with unionized employees, we encountered several workers in the health field who were, in fact, working less than full time in order to pursue additional education.
3. It is also possible that older workers will be more attracted to reduced-time options as they become accustomed to the idea. In our focus groups, it was quite clear that all our participants, including the older people in the group, became more interested in reduced-time options the longer we talked about them and gave them examples of existing innovative programs. We believe this was primarily because people had not thought much about the topic and were unaware of the possibilities. That being the case, initial reactions tended to be somewhat skeptical, but after considering the possibilities, participants seemed to warm up to the topic.
4. When we asked part-time workers why they had decided to work part time, more women than men said it was because of a lack of full-time opportunities. However, because the number answering the question is low, we are hesitant to make too much of this finding.
5. We arrive at the 39% figure by adding the 11% who are currently working part time to the 28% of full-time workers who tell us they have part time options available to them. (The 3% of our sample who identified themselves as “seasonal workers” were not included in this analysis). As for how this compares with the prevalence of other kinds of scheduling options, 37% of unionized employees have some form of flexible start and end times for the workday, and 25% have some form of compressed work schedules.
6. On the question of how in touch union leadership are with regard to members’ desires for reduced-time options, we asked union leaders if they had ever surveyed their members “about their interest in new kinds of scheduling options, such as high-quality part-time options.” About 22% said they had done so. We asked managers a similar question, and about the same percentage (24%) said they had surveyed their employees on the topic.
7. This item—the ability to combine vacation, sick and personal days, and holidays into a single, broader category—is not really a full-fledged reduced-scheduling option. Nevertheless, it does allow workers a little more control over their time. For purposes of analysis, therefore, we clustered it with the other, more dramatic measures by which employees can reduce their work schedules.
8. In a similar question, 65% of union leaders say that creating more options “could only be worked out during formal bargaining sessions, while another 27% say they could be worked out “outside of formal bargaining sessions.” Managers are not quite as likely to say this, but are in general agreement. Fifty-one percent of them say new scheduling options “could only be worked out during formal bargaining sessions with the union,” while 39% say they “could be worked out outside of formal bargaining sessions . . . ”
9. Good examples of how this can be done may be found in the case studies of “work/life redesign” in Jill Casner-Lotto’s *Holding a Job, Having a Life* (Scarsdale, N.Y.: Work in America Institute, 2000). In these case studies, work teams develop strategies for improving employee work/life balance while maintaining and even enhancing productivity.

Appendix 1: Examples from the Field of Reduced-Time Initiatives

This section describes the experiences of unions and management that have negotiated a variety of options to reduce work hours.* For the most part, these options are working—serving both the business needs and work/life needs of employees, employers, and unions. Organizations that have developed positive labor-management relations and a collaborative culture that builds employee-managerial trust and open communications were, not surprisingly, the most likely to have sustained their efforts and addressed problems in a constructive manner. Several cases do, however, demonstrate some of the toughest “sticking points” and areas of resistance that also were apparent in the survey findings. While these efforts would not be described as perfect “win-win” scenarios from both labor and management perspectives, they are included here in order to illustrate the problems and better understand possible solutions.

Though the focus is on the union sector, the learning points are applicable to the nonunion sector as well. By the same token, we have added a nonunion example to the mix of largely labor-management initiatives described, because it contains some noteworthy features, and because the lessons learned are certainly transferable to the union sector. This section is divided into three parts: (1) a brief description of each of these nine initiatives, (2) a discussion of both benefits and drawbacks, and (3) factors that have contributed to the success of these efforts.

NINE REDUCED-WORK-TIME INITIATIVES

American Federation of State, County and Municipal Workers (AFSCME), and Service Employees International Union (SEIU), and Other Unions, San Mateo County, California

Since the late 1970s, San Mateo County, located just outside of San Francisco, has offered a highly successful program called “voluntary time off” (VTO), which allows full-time employees to reduce their hours in exchange for an equal reduction in salary, with full benefits retained. VTO was negotiated in 1978 after passage of Proposition 13, which reduced property-tax rates on homes, businesses, and farms, causing an adverse effect on public-sector budgets. San Mateo officials began searching for ways to reduce their expenses without layoffs, and one of those options became the VTO program.

San Mateo County, as well as Santa Clara County, California, are among the country’s oldest voluntary reduced-hours programs. These initiatives have served as models for other such programs around the country, including one in New York State. The program has grown steadily without a hitch, according to county officials, who point out that San Mateo has benefited from solid labor-management relations over the years. Unions represent about 90% of the 5,000-member county workforce, and virtually every one of them participates in the VTO program, including the two largest, AFSCME and SEIU.

The VTO program differs from traditional part-time or job-sharing classifications, since it provides for smaller time reductions, which make it more affordable for many employees. In addition, there is a time limit on the arrangement. Employees must use the option within a year or else lose the right to that time off. And once employees enroll, they must stick with the percent reduction requested for the whole year.

Employees have five choices for the amount of time they can take off: 1%, 2%, 5%, 10%, or 20% of full-time hours. The hours can be taken in several forms: reduced workday, reduced workweek, or blocks of time (as for extended maternity leave). While VTO has no effect on medical benefits, retirement service credit, life insurance, step increase vacation, or sick leave, there may be an effect on overtime compensation, depending on the option chosen.

Each county department decides whether or not to participate in the program. Employee requests, which are approved by department supervisors, are based on staffing needs. For example, an employee in the tax collector’s office would not be allowed to reduce work hours during the spring, the department’s busiest season. Approval rates are about 95%. Employee participation in VTO varies between 9% and 14% of the eligible workforce, a figure that has remained relatively consistent from the start. Most participants are women, using VTO to extend maternity leave or to take time off when their children are not in school, often during the summer or school holidays.

*These case examples are based on phone interviews with union and management officials, conducted from December 2002 through March 2003, and on printed materials provided by the organizations.

American Federation of State, County, and Municipal Workers (AFSCME), Local 1199, Greater Philadelphia Area, including Southern New Jersey

In the late 1980s during a severe nursing shortage, Local 1199 and Philadelphia-area hospitals and nursing homes designed various alternative schedules that have proven to be successful recruitment tools. Nurses and workers in related areas were unwilling to work a conventional workweek (defined as a 5-day, 40-hour week, with two of those days including the weekend, every other week) in the sometimes difficult or depressing conditions of overcrowded nursing homes and hospitals. The union negotiated a variety of contracts, which include alternative and reduced-hours scheduling provisions carrying full benefits. The most common and popular schedules are:

- Five 8-hour shifts, no weekends
- Two 12-hour shifts on weekends
- Three 12-hour shifts, two on weekdays and one on a weekend day
- Three 8-hour shifts, two on weekend days and one on a weekday

These alternative schedules do not always pay the same amount of money as a conventional schedule would. But the hourly pay for weekend hours is considerably more than the hourly pay for weekday hours: weekend hours are paid either at a time-and-a-half rate or at a negotiated premium rate. For example, the second option is paid as a 36-hour week; the fourth option as a 32-hour week.

Employees want the increased personal time for several reasons, most commonly to take care of young children and to pursue further education. Since most of the alternative schedules involve an increase in weekend hours and a decrease in weekday hours, people take advantage of the free time on weekdays to take classes or enroll in training programs. Many training and educational programs are included as part of the union's benefits package and are fully paid for by the union. In addition to full medical insurance and educational/training programs, the benefits package includes paid vacation time and "all-purpose" days off, beginning at around 12 to 14 days in total and increasing with seniority. There are also provisions for unpaid child-care leave to take care of newborn children. While there is no provision for flexible hours, when employees have needed an adjustment in their working hours, the union has stepped in to help them negotiate this on a case-by-case basis.

Members of this union include nurses' aides, dietary workers, housekeeping staff, and other nonprofessional health-care positions. For the most part, the employees taking advantage of the alternative scheduling options are nurses and workers in nursing-related areas such as nurses' aides. Nearly every facility where union members are employed includes some workers on alternative schedules, and there are settings where as many as 50% to 60% of the employees are on an alternative schedule.

Canadian Auto Workers and DaimlerChrysler, General Motors, Ford, and Other Employers

Since the formation of the CAW in 1985, when it split away from the United Auto Workers, reduced-work-time options have been a major priority. From the start, the union has had two interrelated objectives: increased time away from work and the creation of new jobs. The union estimates that its combined initiatives to reduce hours at the Big Three auto makers in the last round of 2002 negotiations has the potential to create approximately 700 jobs. In agreements with the major auto companies, there have been major gains in extending holidays and vacations, special paid-allowance days, four-day weekends, extended Christmas shutdowns, and negotiated personal days. A worker with 10 to 15 years' seniority now has 388 hours of paid time off per year, the equivalent of 9.7 weeks of annual leave. That means auto workers in Canada have the equivalent of a 33-hour workweek, or viewed in another way, a four-day workweek 95% of the year.

CAW gains extend beyond the Big Three. For example, the fallout of September 11, 2001 adversely affected CAW members in the tourist sector. At the Empress Hotel in Victoria, British Columbia, union leadership encouraged those members with banked vacation time to take their vacation to preserve work for more junior members. In Windsor, workers at the Hilton Hotel adopted a work-sharing agreement in the hope of weathering the downturn. Work sharing, in which layoffs are averted through the reduction of hours rather than jobs, has also been negotiated in the airlines industry (see Air Canada case example).

Specific reduced-work-time initiatives negotiated by the CAW include:

- *Scheduled Paid Absence (SPA)*. The SPA program started in 1993 in the major auto chains with initially three paid days off each year. It is now two weeks each year, and it is time which is fully utilized. When the program works well, there are designated SPA replacement workers to fill in. In these workplaces SPA time off is responsible for securing hundreds of jobs, and it has reduced the number of layoffs. In other situations, where management has been reluctant to hire replacement workers, overtime is used as a way to cover for SPA. In some cases, the issue of replacement has been ignored altogether.
- *Reduced-time-shift schedules*. When the Canadian auto industry wanted to maximize its production capacity, CAW negotiated three shift operations with reduced-work-time schedules. While the typical approach has been to use four crews and the usual hours of work, the CAW approach was to staff plants with three crews who worked 7.5 hour-days and were paid for eight. While in the current restructuring three-shift operations have been eliminated in some locations, reducing shift hours remains an important objective.

In a number of workplaces, special weekend shifts have been negotiated. Workers, usually with high seniority, work some combination of two- or three-day weekend shifts for substantially the same pay as a regular work week. At 3M, workers are paid for 40 hours and full benefits for a 12-hour shift on Saturday and Sunday. At three Montreal hotels (Delta, Intercontinental, and Marriott), members with five years' seniority have the right to choose a four-day week reduced schedule. This opens up opportunities for part-time workers with only two or three days' work in a week, as well as for younger workers who are looking for a job. Reduced-hour shifts have also been negotiated in the hospital, retail, and wholesale sectors.

- *Paid Absence Allowance*. In response to increasing pressures for balancing work with family life, CAW has negotiated more paid absence days, including personal days, floating holidays, and special days off, such as birth days. Efforts are underway to ensure sufficient staffing so personal days can actually be taken.
- *Full Utilization of Paid Time Off*. While the CAW recognizes that taking time off or money in lieu of time off is an individual choice, it encourages its locals to negotiate full utilization of paid time off as a way of preserving and creating jobs. Ford workers negotiated full utilization of workers' vacations in 1993. And, in 1996, Local 88 at CAMI also bargained full utilization of paid time off. Now, with SPA in place and extended Christmas and summer shutdowns, much more of negotiated time off is actually taken.
- *Early and Bridge Retirement*. In addition to its ongoing efforts to negotiate pension improvements that make early retirement a possibility, CAW has continued to develop new approaches to early retirement. A Retirement Phase-In-Program was negotiated with Air Canada and Canadian Airlines in 1991. And, more recently, a Retirement Conditioning for employees with 10 or more years of service was negotiated with DH Howden in Ontario. Employees with over 20 years of service have Fridays off with pay for three months prior to their scheduled retirement date.
- *Overtime Banks*. While the current economic situation has reduced demands for overtime in many workplaces, it's still the case that in good times workers in Canada, as in the United States, log excess hours. Canadian union officials note that in some workplaces, there are members on layoff while other workers are expected to work overtime. In response, CAW has negotiated overtime banks so that overtime hours are linked to additional time off. Overtime banks operate in a variety of ways. For example, an employee working four hours overtime who would normally get paid time and a half can instead opt to put six hours into an "overtime bank," that can then be taken at a later time instead of being paid out. Or employees can split overtime hours, for example, getting four hours pay and two hours in the bank, or three hours pay and three hours in the bank. "The key to success for workers is setting up controls to ensure the banked time is taken, and taken at a time that is meaningful to workers," according to the CAW. While the auto industry has resisted overtime banks due to record-keeping hassles, they have been negotiated in the airline, railroad, and auto parts industries.

Canadian Auto Workers, Locals 1990 and 2213, and Air Canada

In response to the September 11th terrorist attacks and mounting financial pressures after a hostile takeover of Canadian Airlines, Air Canada entered into a 2001 bargaining agreement with CAW's two airline locals that reduced operating costs while preventing layoffs. The main part of the agreement, a voluntary work-sharing program, allowed employees (mostly those in the company's call centers) to work 20% fewer hours in a six- to nine-month period, with location determining the number of months. Employment Insurance (EI) benefits pay for most of the lost time. Thus, full-time employees worked a 32-hour week, while part-time employees on 20-hour shifts worked 16 hours a week. Pension benefits, pay progression, vacation pay, and overtime credits were not affected. Other parts of the agreement include a retirement incentive program, job sharing, and a 35-hour week available only to call center employees.

A significant number of the 8,000 employees eligible signed up for work sharing—more than the number needed in order to prevent layoffs. A limit of 40% was set, with call center reservation agents getting first priority. A total of 1,300 jobs were saved. This was the first time in Canada that a work-sharing agreement was voluntary. Normally, such an agreement requires all employees in a bargaining unit or workforce to participate.

According to union officials, Air Canada had entered into the 2001 agreement reluctantly (the terms of the agreement were actually negotiated by Canadian Airlines before the takeover). Most recently, Air Canada, suffering from a third straight year of heavy losses, has told the CAW and other airline unions it wants to cut a fifth of its payroll costs.

Despite the recent labor agreement forbidding layoffs, Air Canada CEO Robert Milton told reporters those clauses were part of a "bygone era." CAW president Buzz Hargrove said he's open to talk about work sharing or early retirement but not mass layoffs.¹

Communications Workers of America, Verizon, and Other Employers

Balancing work and family responsibilities is a juggling act for CWA members. Most CWA members are either single parents or in dual-income households. Many care for elderly or disabled relatives. This means that CWA members have two jobs—one at home and one at work, according to Donna Dolan, director, Work/Family Issues, District 1, CWA.

Over the years, CWA has negotiated many benefits to help its members meet this dual responsibility. Programs such as new child- and family-care leave with job guarantees, full benefits, and service credits; flexible schedules and flexible personal days; resource and referral programs; joint family-care committees; and family-care funds help members to be productive employees without sacrificing their family responsibilities.

Dolan noted that past experience with flexible scheduling and family benefits shows that helping employees balance work and family also improves the employers' bottom line. Absenteeism, tardiness, stress, turnover, and unproductive work time decrease when workers have the flexibility and assistance they need to meet their family responsibilities. The improved productivity saves millions of dollars for employers as well as improving employee and family well-being.

CWA has negotiated a variety of reduced-work schedules with Verizon as well as other employers. These include:

- Gradual return to work, which allows employees following childbirth or adoption to come back on a part-time basis for as many hours as they want, with full benefits. The period of time varies according to the contract. With Verizon Northeast and Verizon-Mid-Atlantic, CWA has negotiated a one-year period (operator service has a four-hour-per-week minimum), while in the case of the Northern California Newspaper Guild, Local 52, and the *San Francisco Chronicle and Examiner*, an employee can work part time until the child enters kindergarten. The program has proven to be very popular among both men and women.
- Job sharing, which allows two employees to share one job is in the Verizon New England agreement. Benefits are usually prorated and shared by the two employees. Other Verizon Northeast contracts allow job sharing as an alternative to layoffs.
- Unpaid family leave, which, depending on the contract, can extend one or two years to care for an ill family member, a newborn, or an adopted child.

- Voluntary adjustment plan, which, as part of a downsizing, allows employees to voluntarily reduce hours as an alternative to layoff. As long as employees are working 40% of a full-time schedule, they get full benefits. Four-day workweeks, including two major options for four-day 37-hour workweeks—three 10-hour days and one 7-hour day; and three 9-hour days and one 10-hour day.
- Flexible excused workdays, which allow employees to take three out of five personal days on a highly flexible basis—in half-day, two-hour, and, in the case of Local 1400's contract, one-hour increments. Four personal days are paid; one is unpaid.
- Voluntary split shifts, popular in call centers, which regularly experience various peak-and-lull periods in the workday. Split shifts allow employees to work a certain number of hours in the morning and then come back to work in the early evening.
- Voluntary furlough, which allows full-time employees to voluntarily trade income for more time off and to design reduced-work schedules on an annual basis, subject to management concurrence and the needs of the business. Employees receive full benefits and service credit.

Communications Workers of America (CWA), Local 1034, and Other Unions, State of New Jersey

For more than a decade, the State of New Jersey has used a program with its unionized employees called "voluntary furlough." In response to severe budget constraints in 1990, the voluntary furlough program was initially bargained by the CWA and the Department of Environmental Protection (DEP) as a way to minimize layoffs and reduce payroll costs. The program essentially allows full-time unionized state employees to reduce their work hours and salary on an incremental basis while maintaining full benefits. The program is run voluntarily by each department, and the rules are set forth in department regulations rather than in the union contract.

Within each department, employees may request a reduction in their work hours for the coming calendar year, and their salary is then reduced accordingly. Employees may take up to 30 days off per calendar year, with the possibility of a 60-day extension per year. Days can be taken consecutively or intermittently. Requests must be renewed annually. Those employees who opt into the furlough program maintain their full benefits and seniority status, regardless of the number of hours they work. (While pension benefits may be affected, as long as employees work enough hours to be able to afford their pension contributions, they receive their full pension.)

Initially, rank-and-file union members needed to persuade skeptical local union leaders to support the program. Members wanted job security, but they also wanted to retain their benefits. Still, they welcomed the option of more free time, even if it meant some reduction in salary, something union leaders say surprised them. Local 1034 leaders agreed to a pilot program in the DEP, and its success convinced them that this program was something the membership really wanted. The program was popular at the DEP, because many of the young professionals employed there were starting their families and wanted more time off. In addition, many DEP employees had science degrees and expertise and were earning higher salaries than other state employees. Thus, they were better able to afford reduced hours.

While the 1990 fiscal crisis eventually faded, the program had become so popular in the DEP that it spread to other state departments, with the support of Governor Florio's administration. Currently, New Jersey, like many other states, is facing budget concerns. In 2002, Governor McGreevey sent a directive to all state departments to promote participation in the furlough program. Several unions now participate: all seven CWA locals, AFSCME, Service Employees International Union, and the International Federation of Professional and Technical Engineers. Local 1034, representing 15,000 state workers in agencies, including the DEP and the Department of Labor, is CWA's largest local union in New Jersey. Today the program is in place at every state agency, and most employees opt for a four- or three-day workweek.

As a way to augment the voluntary furlough program and develop options for people who cannot afford to make less money but still need time off, New Jersey and the various unions have also negotiated the alternative workweek. Employees may opt to compress their 40-hour week into four days, or their ten-day pay period into nine days. An unexpected bonus of the alternative workweek program has been reduced use of sick time.

Greater Lakes Mental Health Center, State of Washington

About a year and a half ago, in response to drastic cuts in government funding, this nonunion mental-health facility instituted a wide-ranging and progressive change in work-scheduling options, which allowed employees to voluntarily reduce their hours and thus prevent layoffs. Employees could opt to work reduced hours, which were scheduled in a variety of ways. They maintain their full benefits, as long as a certain minimum number of hours are worked per week.

During the first round of funding cuts, management's immediate response was to lay off employees. When a second and third round of cuts were announced, top management sought out alternatives to layoffs by holding a series of "budget dialogues," or brainstorming sessions, open to both employees and managers. A plan evolved to save money by giving employees the option of more time off without pay. Employees and managers alike were enthusiastic about the plan, because it cut costs without resorting to involuntary layoffs.

Located in the Tacoma, Washington, area, the Greater Lakes Mental Health Center provides case management, training, and therapy for persistently and severely mentally ill people on an outpatient basis. Most of the 235 employees are case managers, therapists, and residential counselors. There are also two part-time physicians and six nurses with prescription capabilities. The basic elements of the plan are as follows:

- Employees would be given four additional unpaid holidays—5th of July, Veterans' Day, Christmas Eve, and New Year's Eve.
- Employees could choose to take additional unpaid vacation days.
- Employees could choose to reduce their hours per week.

Benefits remained the same, unless the hours worked fell below 80% of the full-time schedule, in which case, the benefits would be prorated. Supervisors had to sign off on employee scheduling requests, which were submitted in written form. The change was so popular that when it was instituted, reductions in work hours and corresponding cost reductions allowed the facility to save \$50,000 more than needed. With these savings, the four new holidays were changed to "prefunded" or paid holidays.

Two-thirds of the employees took some reduction in work hours. Most chose the option of additional unpaid vacation rather than the reduced workweek option. Of the 40 or so people who chose the reduced workweek option, 30 reduced only to 90%; the other 10 reduced to 80%. No one reduced their workweek to less than 80% of full time; thus everyone has maintained their full benefits package.

Carolyn Petrich, director of human resources and support services, stressed that the success of the program depends on a flexible and cooperative management culture and that the tone is set by the CEO himself. She noted the CEO's accessibility to everyone, his emphasis on open communication, and his recognition of employee ideas and contributions in a weekly newsletter as measures that have built employee trust and goodwill. As a result, employees and managers are more willing to engage in the kind of collaborative decision making necessary to make flexible and reduced-hour schedules work.

International Brotherhood of Electrical Workers, Local 1245, and Pacific Gas & Electric, San Francisco

IBEW's contract has a provision for part-time employees to receive benefits on a prorated basis. Part-time work is defined as 35 hours a week or less. In place for about 10 years, this option is used mostly by clerical workers in PG&E's call centers, where the nature of work varies between peak hours, with very heavy calling, and lighter hours, with fewer calls. The provision for part-time work with partial benefits was instigated by management, and the push behind it has come, and continues to come, entirely from management, since it has meant both substantial cost and scheduling benefits.

Employees who work between 20 and 35 hours per week receive all of their benefits—medical insurance, sick leave, vacation time, and pension—prorated according to the number of hours they work per week. They have some say in determining their hours and shifts, but only at management's discretion. Of the entire union membership, about 12% work part time. A contract provision places a 16.5% cap on the number of part-time workers who can be hired. Despite management preferences for hiring part-time workers, the union has been successful in keeping the 16.5% hiring cap stable.

Other kinds of time-off provisions include: paid vacation time linked to seniority, two or three floating holidays per year, and paid “unanticipated vacation time” (mostly used by people with children, up to 24 hours per year). The child-care leave is unpaid and 12 months is the maximum allowed. If it is no longer than six months, employees are guaranteed the same job upon return. If longer than six months, a job but not necessarily the same job is guaranteed. A leave-of-absence option is also available for people who would like to try staff work.

The option of working a full-time job, but with more flexible hours, is one that members often want. Most commonly, the desired alternative schedule is four 10-hour days per week or three 12-hour days per week. These arrangements are negotiated at the local level, but are not part of the union contract and are formalized as letter agreements. In order for an arrangement to be successfully negotiated, there has to be an agreement on the part of management and a majority vote by the employees affected; over 50% have to be in favor of the change. The compressed work-week option is most often implemented in the areas where people are working in the field, rather than in the service and call centers where employees need to be available to customers during regular business hours.

Office and Professional Employees International Union (OPEIU), San Francisco, Marin County, Sonoma County, California

During the late seventies when federal wage and price controls prohibited unions from bargaining for higher wages, OPEIU’s Bay Area chapter of local unions was successful in bargaining reduced hours while keeping the pay and benefits the same. At that time, the precedent of a 32-hour workweek with full benefits was established. A distinguishing feature of the OPEIU contracts is the flexibility and customized nature of the many contracts it negotiates. Each contract is negotiated according to the specific needs of the members and the management in that setting. Among the most common provisions are those providing for

- a 32-hour workweek with full benefits;
- 9 days every two weeks with full benefits;
- a 35-hour week with full benefits; and
- a 35-, 37-, or 40- hour week with flexible hours.

The only benefit that is not the same is the pension, which is prorated according to the number of hours worked. All other benefits—including medical insurance, sick leave, vacation days and holidays, as well as child-care leave—remain the same as for full-time workers. The employees who take advantage of the shortened workweek find that it is the full-benefit provision that makes it possible for them to do so. The union also frequently negotiates provisions for flexible hours, either in combination with the shorter workweek or with full-time schedules.

The union has about 1,800 members, whose work falls into three categories: (1) the trades, such as plumbers, carpenters, etc., (2) office workers in such settings as pension funds, trust funds, and nonprofit charitable institutions, such as the United Way, and (3) clerical and office workers in universities and cultural institutions, such as museums and art galleries. Since most members work in settings with only a small number of employees, the union negotiates many different contracts; currently there are 170 separate contracts. About 25% to 30% of the membership is involved in some alternative to the standard 40-hour week. Those least likely to be involved are those in offices with just a few workers, where adequate staffing would be difficult to maintain in a shortened workweek.

There are some members who prefer to work a longer workweek, either 35, 37, or 40 hours. These fall into two main categories: (1) younger workers, new to their jobs, who have difficulty affording the high cost of living in the Bay Area and therefore want to maximize their earnings, and (2) workers nearing retirement who want to increase their hours worked in order to maximize their pensions.

THE PROS AND CONS OF REDUCED WORK TIME

For management, the major benefits of providing options for shorter work time relate to improved productivity, cost savings due to reduced salary expenses (and, in some instances, reduced benefit costs), enhanced recruitment and

retention of skilled workers, reduced absenteeism, improved morale and job satisfaction, and a better match of work hours to work flow. Employees gain a precious commodity: more free time, which they have used in a variety of ways to achieve a better work/life balance. Reduced stress is another major benefit, especially for those in difficult jobs such as nursing. And, from the union's standpoint, pushing for options that reduce work time not only can enable employees to better address work/family needs but also can create and preserve good jobs—a social goal that has become increasingly important in the current economic environment.

- *Improved productivity.* In response to critics who say that reduced hours will lead to loss of management control and decreased productivity, CAW official Robert Cherniki has a succinct rebuttal: "Just look at the vehicles we're building. Productivity is up and quality is up. There is a very simple argument for time off: People work better when they are rested." In terms of productivity improvements, CAW's multifaceted reduced hours initiative has clearly paid off. In 1985, 34 vehicles were built for each worker per year; in 2002, 53 cars were built for each worker per year—a significant 56% increase in productivity. "We could apply all our 'share' toward increasing pay, but we would end up with fewer and fewer well-paid jobs," notes Peter Kennedy, assistant to CAW's secretary-treasurer. "For us, it is not about the saying that 'time is money'; rather, we have a choice to make. It is time or money."
- *Cost savings.* The voluntary reduced-hours programs negotiated in San Mateo County, California, and in New Jersey by SEIU, AFSCME, CWA, and other unions have proven to be successful in reducing payroll expenses while maintaining long-term employment security. Paul Hackleman, San Mateo County's benefits manager, said that when the program was first proposed, employees viewed it as a benefit and liked the idea of having some flexibility and more personal time. They particularly like the provision that would permit them to reduce work time in smaller increments than is normally allowed in more traditional part-time arrangements. One of the chief modifications since the program's inception more than 20 years ago has been the addition of 1% and 2% work-time reductions.

Since VTO is administered individually by each county department, the county does not track exact figures. Still, Hackleman estimates that the county saves about \$1.5 million per year through reduced payroll expenses. Management uses VTO in a proactive way: The county's annual spring enrollment campaign not only permits employees to participate for the entire year and gain the maximum time off, but also allows departments an opportunity to use VTO to meet any budget restrictions they anticipate.

- *Improved recruitment and retention.* Clearly, AFSCME's Local 1199 alternative scheduling provisions provided a solution during a severe nursing shortage in the late 1980s. At that time, employers were resorting to hiring nonunion agency workers to fill nursing and related positions. "We were able to say to employers, look, you could take the money you've been spending on agency people, put it into these alternative scheduling options, and attract the people you really want to hire. We were able to show the employers that these kinds of programs did not have to cost them more money," said Peter Gould, Local 1199's executive vice president. In fact, nonunion employers during that period began to offer similar kinds of alternative schedules, even without union pressure to do so, in order to attract qualified staff.
- *Reduced absenteeism.* The way in which time off is allocated can make a big difference in people's attendance. According to union leaders and employees, companies' rigid attendance policies and schedules can have the effect of forcing employees to be dishonest and end up being expensive for the employer. For example, individuals who need two hours off for a doctor's appointment may call in sick for the whole day, since they would be penalized for coming in late or leaving work early. CWA's flexible excused workdays alleviates the problem by allowing employees to take three out of five personal days in small portions of time: in half-day, two-hour, and, in the case of the Local 1400 contract, one-hour increments. Four personal days are paid; one is unpaid. This initiative has been helpful for employees and a savings for management in terms of reduced absenteeism costs.
- *Matching work hours to work flow.* A part-time work force can allow management a more cost-effective way to staff peak and off-peak hours in a business with ebbs and flows in work demand. And when benefits are prorated, there is an additional savings. However, when it is seen as a one-sided management benefit only, as in the IBEW-Pacific Gas & Electric case example, the long-term advantage of such an arrangement is questionable. As

reflected in our survey findings, a major union concern is management's use of part-time work solely as a cost-cutting strategy. This example would seem to fall in that category. (This is discussed in greater detail below in the paragraph on management/union differences.)

- *Better work/life balance.* Reduced work-time options gave employees more free time, and flexible time, to spend with their families, attend to child care or medical care, pursue additional training or formal education, and volunteer in their communities. When unions and management develop an integrated approach toward benefits and scheduling options, various options can complement one another, strengthening the overall benefit package and responding to a variety of employees' work/life needs and preferences. For example, AFSCME Local 1199's inclusion of extensive training and education programs as part of the benefits package allows workers to take advantage of the free time on weekdays in order to enroll in classes or further training paid for by the union. Several unions, such as OPEIU, AFSCME, and CWA have deliberately included, in addition to reduced-hours options, flexible full-time hours and compressed 40-hour workweeks as a way to respond to employees who need flexibility but can't afford to work reduced hours. CAW's multifaceted approach, with such measures as early and phased-in retirement, full utilization of paid time off, and four-day workweeks, supports the union's goal of job creation by opening up opportunities for part-time employees who want more work.
- *Lower stress, improved safety, and job satisfaction.* Proponents of reduced-hours options point out that employees work more effectively and safely, particularly in jobs where conditions can be stressful and pose potential safety hazards, such as health-related and auto industry jobs. Nurses and nurses' aides have welcomed the various reduced-hours schedules negotiated by AFSCME 1199 and Philadelphia employers, and, as noted earlier, these options have proven to be an effective recruitment tool at a time when these positions are difficult to fill. CAW's Robert Cherniki notes that the various reduced-work-time options negotiated with the Big Three auto makers has contributed to savings of \$100 million in workers' compensation due to reduced injuries. At the Great Lakes Mental Health Center, where a variety of options have created more time off from work, employee satisfaction surveys show that ratings are higher than ever, morale and productivity are high, and turnover is low. According to Carolyn Petrich, director of Human Resources and Support Services, "We've had staff leave for better-paying jobs elsewhere only to return. They always say they didn't know just how good they had it here."
- *Improved job security.* One of the biggest union concerns regarding provisions for reduced hours is the fear that moves in that direction will ultimately erode good full-time jobs with benefits. There is indeed justification for those fears. Both research and anecdotal evidence indicate that part-time workers often do become "marginalized" in the work force, relegated to low-status, low-paid, and ultimately dead-end jobs. However, several of the case study experiences in this report—the voluntary reduced hours at San Mateo and New Jersey, the myriad of options at the Big Three Canadian auto makers, time-off provisions at the Great Lakes Mental Health Center, and, most recently, the work-sharing program at Air Canada—all tell another story. In these instances, a variety of well-paid jobs were saved, with full benefits remaining intact.

One strategy that has received increasing attention is work sharing, in which all or part of an organization's workforce reduces its hours and salary as an alternative to layoffs in times of economic downturns. While not intended as a permanent measure, work sharing can help companies weather a temporary economic downturn, retain skilled employees, and improve morale. Work sharing can be combined with short-time compensation (STC), which provides partial unemployment insurance benefits for the lost hours. Such programs are administered by state employment departments in the United States and by the federal employment system in Canada.

Since September 11th, more than 13,000 Canadians in over 650 workplaces have participated in voluntary work sharing, and the practice exists in a variety of industries, ranging from hotels to auto parts. According to union officials, the work-sharing program of CAW Locals 1990 and 2213 with Air Canada, the largest such program ever undertaken with the federal government, has saved 1,300 jobs. However, as noted earlier, the future of that agreement appears to be in jeopardy.

In the United States, 18 states currently have formal programs for work sharing, but participation in the programs over the years has been uneven. A study of short-time compensation in five states, from 1991 to 1994, published by the W.E. Upjohn Institute for Employment Research, notes that employer participation in STC was

low, even though most employers who had used it were satisfied with the program and would use it again. A key attraction for employers was the program's ability to help retain valued employees. The study noted, however, that among firms that had used STC, layoffs remained the primary workforce-reduction strategy. Reasons for low employer participation were unclear, although the study did suggest that lack of information about STC might be partially responsible and that improved marketing might raise participation levels.²

Since the September 11th terrorist attacks in 2001 and the subsequent economic downturn, several states have reported renewed interest in work sharing. In Massachusetts, for example, over 200 employers participated in work sharing in 2002, compared to a few dozen in the early part of 2001. As unemployment has increased, the state of Massachusetts has updated the program with Web-based applications and record keeping to help companies adopt it more easily. In the immediate aftermath of 9/11, fifty businesses—many in travel and tourism—signed up, saving the jobs of over 1,400 workers. Specific companies that had used work sharing, particularly those that had invested heavily in training programs, noted that a key advantage was retaining a skilled work force. According to Linnea Walsh, spokeswoman for the state's Division of Employment and Training: "It is more beneficial and less expensive for the state to pay out partial unemployment benefits as part of work sharing than to have to pay out full benefits to someone laid off altogether." The program is not hurting the Unemployment Trust Fund's viability, according to economist Andre Mayer of the Associated Industries of Massachusetts, an industry group.³

The problems associated with reduced-work-time options pertain to management and union differences concerning the costs involved, matching workload to hours worked, and maintaining adequate work coverage.

- *Management/union differences.* Although management and union attitudes toward the reduced-work-time options in use were generally positive, there were some cases in which managers and union leaders had sharply divergent views about the cost/benefit value of these options. In the AFSCME Local 1199 case, despite the popularity of alternative schedules among nurses and others, management's attitude toward these contract provisions have varied according to the times. While receptive to the provisions when they were instituted during the nursing shortage in the late 1970s, the union noted that managers' attitudes changed a year or two later when the shortage eased. They were viewed as expensive programs, since the union had negotiated to retain full benefits. Despite management attempts to eliminate some of the positions by attrition, the union maintained minimum numbers for alternative schedules in most contracts. Currently, with a renewed nursing shortage, resistance from employers has lessened. The union's perception is that employers will only be on board "if they feel an overriding need for recruitment or retention," according to AFSCME 1199 official Peter Gould.

Similarly, in the OPEIU case, the push for a shorter workweek with full benefits has come mostly from the union, which sees it as a desirable option. According to OPEIU representative Bill Klinke, management has grown increasingly unhappy with the shorter-workweek option over the years, finding it costly and inconvenient. Most employers want at least a 35-hour week and, preferably, a 40-hour week. "Many of these guys [managers], regularly work a 60- or 70-hour week. They don't like to see their employees getting off with a 32-hour week," Klinke noted. In his experience with the bargaining process, management has grown more reluctant to accept the 32-hour week. As a result, several contracts in the past few years have moved to a 35- or 37-hour provision. Klinke's feeling is that the tradition will continue to erode, given today's difficult economic climate.

When there are such sharply divergent management and union views, as in the AFSCME Local 199 and OPEIU examples, conducting a detailed cost-benefit analysis can help. The costs of fringe benefits and any extra administrative expenses for certain positions can be weighed against cost savings due to lower absenteeism or turnover, enhanced recruitment, and any productivity gains resulting from better scheduling or improved employee morale.

On the flip side of this issue, in the IBEW 1245-Pacific Gas & Electric case, the push for part-time work with prorated benefits comes entirely from management, which sees it as a cost-effective way to staff the busy and slow periods in its call centers. According to union leadership, the vast majority of its members prefer to work full time. Most of those working in part-time positions are new hires who took those jobs because they were

the only ones available. Noting the high cost of living in the San Francisco area, IBEW official Dorothy Fortier said that making more money is valued above the opportunity for increased personal time. The fact that these part-time jobs come with prorated benefits makes these options less attractive than they would be if they carried full benefits. But, aside from the question of benefits, the major issue for this union's membership is clearly earning more money, and therefore there is a clear preference for working full-time hours.

Although there are clear advantages for management in terms of both cost and scheduling benefits, there is continuing dissatisfaction on the part of the employees and their union. The question arises, will managers continue to reap the benefits of this arrangement, and at what price in terms of job performance and employee development? While prorating benefits would appear to be a fair solution, apparently the high cost of living and presumably low wages for these call center positions makes part-time work an undesirable choice for many union members. One obvious approach would be to increase wages, thereby making part-time jobs (paid at the same hourly rate as full-time jobs) more desirable. Another compromise would be to prorate benefits, but only if the hours worked fell under a certain percentage; otherwise, employees retain full benefits. This type of arrangement has worked successfully in the case of the Greater Lakes Mental Health Facility. There, benefits are prorated only if the hours worked go below 80% of a full-time schedule. Similarly, CWA and Verizon have negotiated a voluntary adjustment plan, in which employees retain full benefits as long as they work 40% of a full-time schedule.

- *Matching workload to hours.* As noted earlier in section 4 of the survey findings, a major employee concern is that when work hours are reduced, the workload will remain the same. Matching workload to employee hours was, in fact, cited as a problem in the case of the New Jersey Voluntary Furlough Program. The union perspective is that workloads are not necessarily reduced to respond to employees' reduced work hours. Management's goal is to maximize participation in the program within the practical restraints of employees getting their work done. From the state perspective, employees are more productive and work harder during the hours they are actually at work, because they are willing to do what they have to do for that extra time off.

According to union officials, time off is a highly valued choice among union members, and this program is considered a success from both the union and management perspectives. But, left unaddressed, the issue of workloads may over time dampen employees' enthusiasm and deter others who might want to try a reduced work schedule. While the problem needs to be addressed at the work-unit level, a joint labor-management task force could assist by developing guidelines to help supervisors and employees come up with solutions based on the successful experiences of others.

- *Maintaining adequate work coverage.* Another area that needs to be considered is the problem of maintaining adequate coverage when there is particularly strong demand or heavy use of time-off options. While this question was not directly asked in our survey, the concern is somewhat related to two survey findings: (1) that more scheduling options would "create confusion trying to coordinate peoples' schedules." (All three groups—employees, managers, and union leaders—expressed this concern), and (2) managers' fear that more scheduling options could lead to "too many worker or union demands."

At a recent conference presentation of this survey, the finding, which showed significant managerial discomfort with the idea of expanding options for unpaid time off, generated considerable discussion. One company representative noted that in her organization many managers were not favorable toward this option and avoided it, precisely because they anticipated problems dealing with multiple employee requests for time off and maintaining coverage in their work areas. "They are not sure how to handle this in an equitable manner and therefore don't want to even try it," she observed.

Maintaining sufficient coverage during heavy-usage periods is sometimes difficult at the Great Lakes Mental Health Center. However, this is not considered a major drawback, since there is an established policy that when too many people want the same time off, staffing decisions are made on the basis of seniority. In general, the mechanics of working out the scheduling preferences of individual employees is done on an informal, collaborative basis. Within each department, employees and supervisors work together to accommodate people's scheduling choices and create a schedule that is workable for everyone. "There is a high degree of collaboration

within each work team," according to Carolyn Petrich, director of Human Resources and Support Services. The CEO's participatory management style serves as a model for the departmental cooperative decision making that has made flexible and reduced-hour work schedules feasible.

SUCCESS FACTORS

Based on the case study experiences, a number of factors emerged as having contributed to the success of the various reduced-work-time options:

- A cooperative labor-management culture that supports collaborative decision making, trust, and open communications at the top and at work-unit levels
- Surveys to determine union membership needs and desires, conducted at contract time before negotiations begin, and between surveys, frequent informal contacts between union leadership and members to keep leaders abreast of members' views
- Customized contracts negotiated according to the specific needs of the members and management in each work setting
- Pilot programs in one or a few departments to determine the feasibility of an option and to work out the kinks before widespread implementation
- Parameters or caps that limit the number of part-time workers who can be hired in order to guard against the erosion of full-time jobs
- An integrated approach that supports a variety of reduced-hour options, as well as flexible full-time options, in order to respond to diverse membership needs and preferences

APPENDIX 1 NOTES

1. Charles Grandmont, "Air Canada Unions Ready to Talk, Wary of Job Cuts," Reuters, via AOL News, February 6, 2003.
2. Berkeley Planning Associates and Mathematica Policy Research, Inc., Evaluation of Short-Time Compensation: Final Report, (Washington, D.C.: U.S. Department of Labor; Employment and Training Administration, 1997).
3. Alan Earls, "Program Helps Firms Avert Layoffs," Boston Sunday Globe, February 9, 2003, p. G1.

Appendix 2: Methodology

This research project combined qualitative and quantitative methods. First, we convened a meeting of practitioners and experts from academia, labor, management, and the nonprofit sector, in the form of a National Advisory Council or NAC (see the Acknowledgements section). The NAC helped us begin to define the issues we would be studying. Second, we conducted a series of focus groups with unionized employees, union leaders, and managers of unionized employees to further identify the issues we would tackle in the survey stage, and to help us understand the best language to use in designing questions. Third, we designed and fielded a phone survey of 601 unionized employees, along with a comparison group of 214 nonunionized employees, as well as mail surveys of union leaders and managers. Finally, we conducted additional focus groups with employees, managers, and union leaders to explore the survey implications.

FOCUS GROUPS

Nine focus groups were conducted prior to the design of the survey instruments, in Englewood (New Jersey), Detroit and Los Angeles. In each location, three groups were conducted, one each with unionized employees, union leaders, and managers of unionized employees.

Four additional focus groups were conducted as a follow-up to the survey, to help us better understand the results and how they might be applied by those wishing to develop reduced time options in unionized workplaces. During this series of groups we spoke with unionized employees and union leaders in Englewood, and managers of unionized employees in New York City and Boston.

The New York City managers' group was held in a Verizon facility with their managers exclusively. All other groups were arranged through market research facilities, and included cross-sections of employees, union leaders and managers from a variety of organizations in the surrounding area. All focus groups were conducted by senior researchers from Work in America.

SURVEY METHODOLOGY

Several surveys were conducted: a phone survey with unionized and nonunionized employees, as well as mail surveys with managers and union leaders. In all cases, the surveys were designed by Work in America and fielded by Robinson and Muenster Associates.

Phone Survey

Phone interviews were conducted with 601 unionized employees and 214 non-union employees. The unionized workers' phone survey was fielded between July 5th and July 21st, 2002. Because some states have very few unionized employees, a national random sample phone survey of unionized employees would not have been cost effective. We therefore elected to conduct a random sample survey within the thirteen states with the greatest density of unionized workers. Based on Bureau of Labor Statistics data, these states are New York, Hawaii, Michigan, Washington, New Jersey, Alaska, Nevada, Minnesota, Connecticut, Wisconsin, Illinois, Ohio, and California. On average, about 20% of the workers in these states are unionized, and they account for 60% of all unionized employees nationwide.

We applied a stratified random sampling methodology to make sure each state was proportionately represented according to the number of unionized employees in its population. (California has more unionized employees than Connecticut, so we made sure we had proportionally more interviews from California in our data set.) Technically speaking, it can be said with the greatest confidence that our sample represents the views of unionized workers in the 13 states. However, our sample is varied enough by region, industry, and occupation that we feel confident these results capture the views of America's unionized workers in general in a reasonably accurate fashion. Our respondents came from New York, New England, the Rust Belt, and the western-most reaches of the nation. They represent both service and manufacturing industries, and the private and public sectors. Their occupations range from factory workers to food service workers, from cashiers to postal workers, and from teachers to truck drivers.

The core sample of 601 interviews with unionized employees has a margin of error of plus or minus 4 percentage points. Other sources of error that can affect survey results were avoided or reduced whenever possible by, for example, rotating a series of questions to eliminate distortions caused by question order effects.

Weighting the data based on gender. Nationally, about 57% of union members are male and 43% are female, based on Bureau of Labor Statistics data. In our survey results, due to response patterns (e.g., females are more likely to engage in surveys), we ended up with closer to a 50/50 gender split. To compensate, we weighted some of the data to simulate the 57/43 gender split. Specifically, we used weighted data on those questions where differences between male and female responses were statistically significant. Nevertheless, weighting never substantively affected the overall results, at most resulting in single percentage point changes.

The nonunionized employees' comparison group. Our 214 nonunionized employee comparison survey was drawn from a random sample of the continental U.S., and was fielded between July 5th and July 17th, 2002.

Mail Survey Methodology

Union leaders and managers were surveyed through mail questionnaires, netting responses from 181 union leaders and 124 managers. Of the latter, 59 have responsibility for unionized employees. Because we found that managers of unionized and nonunionized employees answered many questions differently, we restricted ourselves in the report to our main concern—that is, we reported data only from the managers who work with unionized employees. As we note in several places in the text, because of the rather small “n,” the managers’ data should be considered as suggestive rather than definitive. To strengthen our reading of managers of unionized employees, we conducted an extra focus group with them. (In all, we conducted five focus groups with managers, and four each with employees and union leaders.)

The mail surveys were drawn from lists provided by Scientific Telephone Samples. The union sample included local union leaders nationwide. The managers’ sample was concentrated in the 13 states with the highest density of unionized workers (to increase our chances of finding the kind of managers we were looking for).

The mail surveys were fielded in two waves. The first began with 2,000 letters on June 28, 2002 with a cover letter and a questionnaire, followed by a postcard reminder about two weeks later, and then another cover letter/questionnaire mailing about two weeks after that. This procedure was repeated in a second wave beginning in mid-September, 2002.

Appendix 3: Employee Phone Survey Instrument and Marginal Results for Unionized and Non-unionized Employees

Hello, my name is _____ and I'm calling for the Work in America Institute, a nonprofit, nonpartisan organization whose mission is to improve the workplace. We are not selling anything, we are conducting a survey about important workplace issues, and your answers are completely confidential. If I may, I'd like to begin by asking you a few questions to make sure I'm talking to the right person.

Screener Q1: Which of the following best describes your employment situation. And if you have more than one job, please answer for the job where you usually work the most hours.

	Union	Non-union
[READ]		
I'm currently a non-managerial, full-time employee in a company, organization or government agency	87*	78
I'm currently a non-managerial, regular-part-time employee in a company, organization or government agency	11	17
I'm currently a non-managerial seasonal worker for a company, organization or government agency.	3	5
I'm currently self-employed or working as an independent contractor (including consulting, free-lance or temp work)		
I'm NOT currently employed		
[DO NOT READ] Don't Know		
[DO NOT READ] Refused/Not applicable		

Screener Q1A: [FOR "SEASONAL" WORKERS]

When you do work, do you mostly work full time or part time?

	Union	Non-union
Full time	77	82
Part time	24	18

[READ: "Please think of this job when answering the following questions."]

Screener Q2: Do you currently belong to a union?

	Union	Non-union
Yes	100	
No		100
[DO NOT READ] Don't Know		
[DO NOT READ] Refused/Not applicable		

* All results reported in this appendix are percentages, not raw numbers. Totals may not equal 100 due to rounding.

Screeners Q3: What state do you currently work in? [FOR UNIONIZED EMPLOYEES]

	Union	Non-union
[DO NOT READ LIST]		
Alaska	2	
California	19	
Connecticut	2	
Hawaii	1	
Illinois	9	
Michigan	11	
Minnesota	4	
Nevada	2	
New Jersey	7	
New York	25	
Ohio	9	
Washington	6	
Wisconsin	4	
[DO NOT READ] OTHER STATE		
[DO NOT READ] Don't Know		
[DO NOT READ] Refused/Not applicable		

Q1: Here are three problems you may or may not be dealing with at work. Which of the three is the biggest issue for you, personally? [READ]

	Union	Non-union
Making too little money	31	43
Having too little time for your personal and family life	29	24
Problems with supervisors	17	10
[DO NOT READ] None of them are problems	23	23

Q2: Here are some ways of giving employees more time for their personal lives. For each one, please let me know if your workplace offers it - and if you don't know, just say so.

How about, flexibility to start and end the workday earlier or later than the regular schedule? Does your workplace have this, or not?

	Union	Non-union
Yes	37	65
No	62	33
[DO NOT READ] Don't Know	1	2
[DO NOT READ] Refused/Not applicable		

Q2B: And have you ever made use of this, or not?

	Union	Non-union
Yes	86	89
No	15	11
[DO NOT READ] Don't Know		
[DO NOT READ] Refused/Not applicable		1

Q3: How about, compressed work schedules-for example, working four 10-hour days per week?

Does your workplace have some form of compressed schedules, or not?

	Union	Non-union
Yes	25	32
No	74	65
[DO NOT READ] Don't Know	1	2
[DO NOT READ] Refused/Not applicable		

Q3B: And have you personally ever made use of this, or not?

	Union	Non-union
Yes	64	62
No	36	36
[DO NOT READ] Don't Know		
[DO NOT READ] Refused/Not applicable		1

Q4: How about, part-time scheduling options. Does your workplace have this, or not?

	Union	Non-union
Yes	28	46
No	70	49
[DO NOT READ] Don't Know	2	5
[DO NOT READ] Refused/Not applicable		1

Q4B: And have you personally ever made use of this, or not?

	Union	Non-union
Yes	23	21
No	77	79
[DO NOT READ] Don't Know		
[DO NOT READ] Refused/Not applicable		

Q4C: As best you can remember, what was your main reason for choosing to work part time? [FOR THOSE ANSWERING "YES"]

	Union	Non-union
[DO NOT READ]		
Additional income, second job, start business, moonlight	20	6
Care for sick or needy family member or friend	9	6
Child care coverage problems	6	6
Education, schooling, training, lifelong learning		24
Lack of full time opportunities, couldn't find full time job, employer place me on part-time schedule, not my choice, etc.	17	
Leisure to pursue interests and hobbies	3	6
Slow down, get off fast track, "downshift," lower stress, etc.	6	
To spend more time with friends, family, kids	11	18
Something else [SPECIFY]	17	24
[DO NOT READ] Don't Know	3	
[DO NOT READ] Refused/Not applicable	9	12

Q5: Earlier you said you work part-time. As best you can remember, what was your main reason for choosing to do so?

	Union	Non-union
[DO NOT READ]		
Additional income, second job, start business, moonlight	4	
Care for sick or needy family member or friend	1	3
Child care coverage problems	13	5
Education, schooling, training, lifelong learning	7	28
Lack of full time opportunities, couldn't find full time job, employer place me on part-time schedule, not my choice, etc.	13	13
Leisure to pursue interests and hobbies	1	5
Slow down, get off fast track, "downshift," lower stress, etc.	5	5
To spend more time with friends, family, kids	23	15
Something else [SPECIFY]	27	26
[DO NOT READ] Don't Know	5	
[DO NOT READ] Refused/Not applicable		

Q6 [FOR THOSE WITH PART-TIME OPTIONS]:

Now, different workplaces have different kinds of part-time options. Which of the following statements best describes the part-time options in your workplace? POOR QUALITY part-time options, with low-pay and little or no benefits or job security OR HIGH QUALITY part-time options, with good pay, benefits and job security.

	Union	Non-union
POOR QUALITY PART-TIME OPTIONS	24	40
HIGH QUALITY PART-TIME OPTIONS	60	41
[DO NOT READ] Some of both. In the middle. Etc.	9	9
[DO NOT READ] Don't Know	7	5
[DO NOT READ] Refused/Not applicable	1	5

Q7 [FOR THOSE WITHOUT PART-TIME OPTIONS]:

Now, different workplaces have different kinds of part-time options. Which of the following statements best describes the part-time options in most of the places where you've worked? POOR QUALITY part-time options, with low-pay and little or no benefits or job security OR HIGH QUALITY part-time options, with good pay, benefits and job security.

	Union	Non-union
POOR QUALITY PART-TIME OPTIONS	41	49
HIGH QUALITY PART-TIME OPTIONS	19	22
[DO NOT READ] Some of both. In the middle. Etc.	4	2
[DO NOT READ] Never had part-time options in any job.	24	15
[DO NOT READ] Don't Know	5	6
[DO NOT READ] Refused/Not applicable	7	5

Q8: If you had more high quality part-time options available to you right now, how likely do you think you would be to use them and reduce your schedule? Very likely, somewhat likely, not too likely, or not likely at all?

	Union	Non-union
[DO NOT READ]		
Very likely	18	19
Somewhat likely	15	17
Not too likely	16	16
Not likely at all	44	41
[DO NOT READ] Don't Know	3	4
[DO NOT READ] Refused/Not applicable	4	3

Q9A [FOR THOSE ANSWERING "YES"]: What would you say is your main reason for saying that?

	Union	Non-union
[DO NOT READ]		
Additional income, second job, start business, moonlight	20	14
Care for sick or needy family member or friend	3	
Child care coverage problems	2	2
Education, schooling, training, lifelong learning	4	2
Lack of full time opportunities, couldn't find full time job, employer place me on part-time schedule, not my choice, etc.		
Leisure to pursue interests and hobbies	10	16
Slow down, get off fast track, "downshift," lower stress, etc.	11	14
To spend more time with friends, family, kids	30	25
Something else [SPECIFY]	10	14
[DO NOT READ] Don't Know	3	5

Question Q9B [FOR THOSE ANSWERING "NO"]: What would you say is your main reason for saying that?

	Union	Non-union
[DO NOT READ]		
Money: Couldn't afford to work less, need the money, need the overtime pay, etc.	55	62
Seniority: Wouldn't want to lose seniority	4	2
Health insurance: Wouldn't want to lose health insurance coverage	3	3
Other benefits besides health insurance, including loss/reduction of pension payments	3	3
Job security: Afraid of being laid off first if work part-time	4	
Loss of full-time option, afraid wouldn't be able to go back to full time if wanted to	5	3

Something else [SPECIFY]	13	16
[DO NOT READ] Don't Know	3	3
[DO NOT READ] Refused/Not applicable	1	

Q10: Currently, what's your situation at work with regard to overtime? Do you have NO overtime, VOLUNTARY overtime opportunities that you can refuse without penalties, or MANDATORY overtime?

	Union	Non-union
NO overtime	29	38
VOLUNTARY overtime opportunities that you can refuse without penalties	49	43
MANDATORY overtime	19	15
[DO NOT READ] Don't Know	1	1
[DO NOT READ] Refused/Not applicable	2	3

Q10B: Is your mandatory overtime usually scheduled far enough in advance that you are able to plan for it, or is it usually scheduled at the last minute and hard to plan for?

	Union	Non-union
Scheduled far enough in advance that you are able to plan for it	41	41
Usually scheduled at the last minute and hard to plan for	53	56
[VOLUNTEER:] Sometimes one and sometimes the other, it changes, etc.	6	3
[DO NOT READ] Don't Know	1	
[DO NOT READ] Refused/Not applicable		

Q11: Now I'd like to ask about your views on different kinds of scheduling options that you might or might not have available to you at work. If you don't know an answer, please say so.

How about the option to adjust your schedule so you could work 90% of a full-time schedule for 90% of wages and 90% of benefits, 80% of full-time schedule for 80% of wages and 80% of benefits, and so on through 70%, 60%, etc. Do you have an option similar to this where you work, or not?

	Union	Non-union
Yes	14	16
No	79	72
[DO NOT READ] Don't Know	6	10
[DO NOT READ] Refused/Not applicable	1	2

Q11B: Have you ever used this option, or not?

	Union	Non-union
Yes	38	29
No	61	69
[DO NOT READ] Don't Know		3
[DO NOT READ] Refused/Not applicable	1	

Q11C: If this option were available to you, do you think you would seriously consider using it at this point in your life, or not?

	Union	Non-union
Yes	30	35
No	63	57
[DO NOT READ] Don't Know	7	6
[DO NOT READ] Refused/Not applicable	1	2

Q11D: If your employer wanted to do it, do you think it would be relatively easy or relatively hard to put it in place?

	Union	Non-union
Relatively easy	22	26
Relatively hard	68	59
[DO NOT READ] Don't Know	9	12
[DO NOT READ] Refused/Not applicable	1	3

Q12: How about being able to combine vacation days, sick days, personal days and holidays into one category of paid time off days, and you could use these for any purpose you wish as long as you schedule it in advance. Do you have an option similar to this where you work, or not?

	Union	Non-union
Yes	44	50
No	52	43
[DO NOT READ] Don't Know	3	5
[DO NOT READ] Refused/Not applicable	1	3

Q12B: Have you ever used this option, or not?

	Union	Non-union
Yes	80	74
No	20	26
[DO NOT READ] Don't Know		
[DO NOT READ] Refused/Not applicable		

Q12C: If this option were available to you, do you think you would seriously consider using it at this point in your life, or not?

	Union	Non-union
Yes	66	68
No	29	25
[DO NOT READ] Don't Know	4	4
[DO NOT READ] Refused/Not applicable	1	4

Q12D: If your employer wanted to do it, do you think it would be relatively easy or relatively hard to put it in place?

	Union	Non-union
Relatively easy	35	51
Relatively hard	58	39
[DO NOT READ] Don't Know	7	7
[DO NOT READ] Refused/Not applicable	1	4

Q13: How about being able to adjust your schedule at different times of the year to fit both your own and the organization's needs. For example, you might work a reduced schedule during part of the year and full-time schedule the rest of the year. Do you have an option similar to this where you work, or not?

	Union	Non-union
Yes	25	39
No	71	53
[DO NOT READ] Don't Know	2	7
[DO NOT READ] Refused/Not applicable	1	2

Q13B: Have you ever used this option, or not?

	Union	Non-union
Yes	72	55
No	27	45
[DO NOT READ] Don't Know	1	
[DO NOT READ] Refused/Not applicable		

Q13C: If this option were available to you, do you think you would seriously consider using it at this point in your life, or not?

	Union	Non-union
Yes	43	44
No	51	47
[DO NOT READ] Don't Know	4	6
[DO NOT READ] Refused/Not applicable	1	2

Q13D: If your employer wanted to do it, do you think it would be relatively easy or relatively hard to put it in place?

	Union	Non-union
Relatively easy	20	33
Relatively hard	72	54
[DO NOT READ] Don't Know	7	11
[DO NOT READ] Refused/Not applicable	1	2

Q14: How about the option to take extra time off without pay, beyond paid vacation days, and have the lost pay spread across the whole year's paychecks to help you afford it. Do you have an option similar to this where you work, or not?

	Union	Non-union
Yes	29	32
No	65	57
[DO NOT READ] Don't Know	5	9
[DO NOT READ] Refused/Not applicable	1	2

Q14B: Have you ever used this option, or not?

	Union	Non-union
Yes	49	38
No	51	62
[DO NOT READ] Don't Know		
[DO NOT READ] Refused/Not applicable		

Q14C: If this option were available to you, do you think you would seriously consider using it at this point in your life, or not?

	Union	Non-union
Yes	50	51
No	43	38
[DO NOT READ] Don't Know	6	8
[DO NOT READ] Refused/Not applicable	1	2

Q14D: If your employer wanted to do it, do you think it would be relatively easy or relatively hard to put it in place?

	Union	Non-union
Relatively easy	30	44
Relatively hard	57	40
[DO NOT READ] Don't Know	11	14
[DO NOT READ] Refused/Not applicable	2	3

Q15: Moving on, if you had a choice, would you rather be paid time-and-a-half for overtime hours or get time-and-a-half OFF for the overtime hours you work?

	Union	Non-union
Paid time-and-a-half for overtime hours	69	70
Get time-and-a-half off for the overtime hours you work	20	18
[VOL.] It depends, sometimes one and sometimes another, and similar comments	7	3
[DO NOT READ] Don't Know	2	3
[DO NOT READ] Refused/Not applicable	2	6

Question READ

Now I'd like to ask you about some of the possible effects of offering a greater variety of scheduling options in your workplace.

Q16: If employees had a greater variety of scheduling options, do you think it is likely or unlikely it would...Help them balance their work and personal or family lives better?

	Union	Non-union
Likely	79	78
Unlikely	14	13
[DO NOT READ] Don't Know	6	7
[DO NOT READ] Refused/Not applicable	2	3

Q17: If employees had a greater variety of scheduling options, do you think it is likely or unlikely it would...Improve worker morale?

	Union	Non-union
Likely	72	70
Unlikely	20	21
[DO NOT READ] Don't Know	7	6
[DO NOT READ] Refused/Not applicable	1	3

Q18: If employees had a greater variety of scheduling options, do you think it is likely or unlikely it would...Create problems for full-time workers who might end up having to carry a bigger load if more people choose to work part time?

	Union	Non-union
Likely	51	57
Unlikely	37	33
[DO NOT READ] Don't Know	8	8
[DO NOT READ] Refused/Not applicable	3	3

Q19: If employees had a greater variety of scheduling options, do you think it is likely or unlikely it would...Make it easier to match people's hours to the organization's needs during busy and slow periods?

	Union	Non-union
Likely	59	61
Unlikely	29	28
[DO NOT READ] Don't Know	9	9
[DO NOT READ] Refused/Not applicable	4	2

Q20: If employees had a greater variety of scheduling options, do you think it is likely or unlikely it would...create confusion trying to coordinate people's schedules?

	Union	Non-union
Likely	65	65
Unlikely	30	30
[DO NOT READ] Don't Know	4	3
[DO NOT READ] Refused/Not applicable	2	3

Q21: If employees had a greater variety of scheduling options, do you think it is likely or unlikely it would...Lower work quality because part-time workers might be worse at their jobs than full-time workers?

	Union	Non-union
Likely	37	40
Unlikely	49	49
[DO NOT READ] Don't Know	12	8
[DO NOT READ] Refused/Not applicable	3	3

Q22: If employees had a greater variety of scheduling options, do you think it is likely or unlikely it would...Reduce unscheduled absences?

	Union	Non-union
Likely	64	63
Unlikely	27	26
[DO NOT READ] Don't Know	7	8
[DO NOT READ] Refused/Not applicable	2	3

Q23: If employees had a greater variety of scheduling options, do you think it is likely or unlikely it would...Help your employer attract and keep quality workers?

	Union	Non-union
Likely	68	71
Unlikely	23	19
[DO NOT READ] Don't Know	7	7
[DO NOT READ] Refused/Not applicable	2	3

Q24: If employees had a greater variety of scheduling options, do you think it is likely or unlikely it would...Help the union attract and keep members

	Union	Non-union
Likely	62	
Unlikely	24	
[DO NOT READ] Don't Know	10	
[DO NOT READ] Refused/Not applicable	3	

READ: Now, how close to your own view is each of the following statements about creating a greater variety of scheduling options? How about...

Q25: Having a greater variety of scheduling options available to me could be a big help at certain points in my life. Is that very close, somewhat close, not too close or not close at all to your own views?

	Union	Non-union
Very close	53	49
Somewhat close	23	29
Not too close	8	8
Not close at all	13	10
[DO NOT READ] Don't Know	2	1
[DO NOT READ] Refused/Not applicable	2	2

Q26: I would only be comfortable creating a greater variety of scheduling options if it were clearly negotiated in our contract. Is that very close, somewhat close, not too close or not close at all to your own views?

	Union	Non-union
Very close	56	
Somewhat close	22	
Not too close	7	
Not close at all	12	
[DO NOT READ] Don't Know	2	
[DO NOT READ] Refused/Not applicable	1	

Q27: In my workplace I'd be comfortable talking to management about working part time. Is that very close, somewhat close, not too close or not close at all to your own views?

	Union	Non-union
Very close	34	45
Somewhat close	16	15
Not too close	11	11
Not close at all	33	25
[DO NOT READ] Don't Know	2	1
[DO NOT READ] Refused/Not applicable	3	3

Q28: The main reason I'm NOT interested in part-time options is because I like being at work so much. Is that very close, somewhat close, not too close or not close at all to your own views?

	Union	Non-union
Very close	15	19
Somewhat close	20	16
Not too close	17	18
Not close at all	45	42
[DO NOT READ] Don't Know	2	1
[DO NOT READ] Refused/Not applicable	1	3

Q29: If I were to work fewer hours I'd still end up having to do the same workload. Is that very close, somewhat close, not too close or not close at all to your own views?

	Union	Non-union
Very close	47	48
Somewhat close	17	23
Not too close	13	10
Not close at all	20	14
[DO NOT READ] Don't Know	3	3
[DO NOT READ] Refused/Not applicable	1	2

Q30: Now suppose there were more high quality part-time options in your workplace. Is it likely or unlikely this would help the organization minimize layoffs by encouraging people to reduce their hours and earnings during a business slow-down?

	Union	Non-union
Likely	41	51
Unlikely	38	31
[DO NOT READ] Don't Know	11	12
[DO NOT READ] Refused/Not applicable	9	6

Q31: Now, suppose you could choose among the following work schedules. Which would you probably select at this point in your life? Your current work schedule, OR 90% of a full-time schedule with 90% pay and 90% benefits, OR 80% of a full-time schedule with 80% pay and 80% benefits, and so on through 70%, 60%, all the way down to 0.

	Union	Non-union
[DO NOT READ RESPONSE CATEGORIES]		
Current work schedule	70	58
90% schedule, pay, benefits	16	22
80% schedule, pay, benefits	7	11
70% schedule, pay, benefits	2	3
60% schedule, pay, benefits	1	1
50% schedule, pay, benefits	1	2
40% schedule, pay, benefits		
30% schedule, pay, benefits		
0% schedule, pay, benefits	1	
[DO NOT READ] Don't Know	2	2
[DO NOT READ] Refused/Not applicable	1	2

Q32: Now I'd like to ask you how you think management would react to the idea of offering a greater variety of scheduling options for employees. Do you think management would be more likely to support OR resist the idea?

	Union	Non-union
SUPPORT	28	38
RESIST	65	53
[DO NOT READ] Don't Know	5	8
[DO NOT READ] Refused/Not applicable	2	1

Q32B: [FOR THOSE WHO SAID "RESIST"] Do you think the main reason management is likely to resist is because:

	Union	Non-union
[READ]		
They'd see it as too much of an administrative headache? OR	52	56
They'd see it as too costly? OR	16	19
They'd be afraid it would result in more worker demands? OR	6	8
Something else [Specify]	22	13
[DO NOT READ] Don't Know/NA	3	5

Q33: And now I'd like to ask you how you think union leadership would react to the idea of offering a greater variety of scheduling options for employees. Do you think union leadership would be more likely to resist or support the idea?

	Union	Non-union
SUPPORT	55	
RESIST	30	
[DO NOT READ] Don't Know	14	
[DO NOT READ] Not applicable	1	

Q33B: [FOR THOSE ANSWERING "RESIST"] Do you think the main reason union leadership is likely to resist is because:

	Union	Non-union
[READ]		
They'd be afraid management would exploit the changes in some way, OR	36	
They don't see it as important to enough of their members, OR	15	
They feel it might weaken the union in some way, OR	27	
Something else? [Specify]	23	
[DO NOT READ] Don't Know/NA		

Q34: Currently, where would you say offering a greater variety of scheduling options for employees is on the union agenda? Near the top, in the middle, near the bottom, or not on the agenda at all?

	Union	Non-union
Near the top	9	
In the middle	21	
Near the bottom	23	
Not on the agenda at all?	41	
[DO NOT READ] Don't Know	6	
[DO NOT READ] Not applicable	1	

Q35: In your view, where SHOULD it be on the union's agenda? Near the top, in the middle, near the bottom, or not on the agenda at all?

	Union	Non-union
Near the top	25	
In the middle	40	
Near the bottom	14	
Not on the agenda at all?	15	
[DO NOT READ] Don't Know	4	
[DO NOT READ] Not applicable	1	

Q36: Would you describe labor-management relations at your workplace as mostly adversarial, mostly cooperative, or somewhere in between?

	Union	Non-union
Mostly adversarial	16	
Mostly cooperative	37	
Somewhere in-between	45	
[DO NOT READ] Don't Know	2	
[DO NOT READ] Refused	1	

Q37: Would you say you personally, mostly trust management, mostly distrust management, or are somewhere in between?

	Union	Non-union
Mostly trust management	27	47
Mostly distrust management	24	11
Somewhere in between	48	41
[DO NOT READ] Don't Know	1	1
[DO NOT READ] Refused/Not applicable	1	

Q38: And which comes closest to your view of your union:

	Union	Non-union
My union usually has my best interests at heart and is strong enough to protect my interests, OR	43	
My union usually has my best interests at heart but is too weak to protect my interests, OR	32	
My union too often does not have my best interests at heart.	19	
[DO NOT READ] Don't Know	4	
[DO NOT READ] Refused/Not applicable	1	

READ: Now I'm just going to ask you a few more questions for statistical purposes.

Q39: Considering your main job again, what type of work do you do OR what are your main duties? [SPECIFY OPEN END]

	Union	Non-union
Accounting	1	3
Clerical/Secretary/Assistant	5	12
Assembly/Factory/Manufacturing	13	8
Cashier/Retail	4	6
Paraprofessional	2	4
Construction	4	1
Customer Service/Telecommunications	4	5
Delivery/Driver	4	1
Education	14	3
Electrical/Carpentry/Plumbing	6	2
Custodial/Maintenance	4	4
Managerial/Administrative	2	6
Medical/Health Care	4	6
Food Service	3	5
Computers	2	7
School bus driver/aide	2	
Machinery/Mechanic	3	3
Police/Security/Corrections officer	4	1
Truck Driver	2	1
Marketing/Sales	1	2
Shipping/Packaging	1	3
Forklift/Equipment Operator	2	1
Care provider	2	3
Postal	1	
Refused	1	
Foreman/Supervisor/Director	1	3
Social Services	1	
General/Manual labor	3	4
Other	5	8

Q40: What is your job title or position? [SPECIFY OPEN END]

	Union	Non-union
Assembler/Assembly	3	1
Cashier	1	1
Educator (Teacher/Instructor/Professor/Aide)	15	3
Customer Service/Sales/Marketing	3	4
School Bus Driver	5	1
Truck Driver	2	1
Laborer/Construction/Warehouse	5	8
Machinist/Operator	7	3
Clerical	3	7
Custodian/Maintenance/Housekeeper	4	2
Nurse/RN/Medical Assistant/Physician/Social Worker	4	4
Clerk/Accounts Receivable/Teller	5	8
Manager/Director/Foreman/Labor Leader	2	8
Food Service/Bartender/Waiter/Cafeteria/Chef/Cook/Hostess	3	4
Child Care/Caregiver/Daycare		3
Mail Carrier	1	
Police/Fireman/Sergeant	3	1
Skilled Labor/Electrician/Brick Layer/Welder/Plumber	9	3
Upper Management/Superintendent/Dean	1	1
Supervisor/Senior Teller/Group Leader	1	2
Mechanic/Repairman	3	2
Technician/Engineer/Programmers	4	8
Refused/No answer/Not applicable	2	2
Coordinator/Planner/Dispatcher	3	5
Analyst/Specialist/Project Manager/Inspector/Adjuster/		
Appraiser/Insurance	1	5
Database/Publishing/Software/Accountant/Paralegal	2	2
Other	9	10

**Q41: And what is the primary business of your organization? That is, what does it make or do?
[SPECIFY OPEN END]**

	Union	Non-union
Automotive	5	1
Construction	6	3
Delivery	4	2
Education	21	3
Utilities	4	2
Food Service	3	1
Grocery	4	1
Healthcare	6	12
Insurance		5
Manufacturer	9	12
Law Enforcement	5	1
Postal	3	1
Restaurant		3
Retail	5	14
Banking		4
Printing	3	4
Government	8	4
Hotel	1	2
Childcare	1	3
Refused	2	2
Shipping	1	1

Building	4	4
Communications	2	3
Other	5	12

Q41B: Would you say you work in a manufacturing industry, a private sector service industry, a public sector service industry, or something else?

	Union	Non-union
Manufacturing	21	17
Private sector service	18	35
Public sector service [NOTE: Public Sector Service includes state, federal and municipal employees, public schools, etc.]	58	42
Something else [SPECIFY]	2	4
Don't Know	1	1
Refused/Not Applicable	1	

Q42: Are you paid by the hour or do you receive a salary?

	Union	Non-union
Paid by the hour	74	68
Salary	26	31
[DO NOT READ] Don't Know		1
[DO NOT READ] Refused/Not applicable		1

Q43: In your main job, about how many hours per week are you usually scheduled to work at a minimum? [CODE EXACT HOURS]

	Union	Non-union
1-10	1	1
11-20	4	6
21-30	7	11
31-40	77	66
41-50	7	9
51-60	2	3
>60	1	1
[DO NOT READ] Don't Know	1	1
[DO NOT READ] Refused/Not applicable	1	1

Q44: And how many hours did you actually work at this job in the last full week you worked?

[CODE EXACT HOURS]

	Union	Non-union
1-10		1
11-20	4	3
21-30	6	13
31-40	53	43
41-50	20	25
51-60	11	9
>60	4	3
[DO NOT READ] Don't Know	2	
[DO NOT READ] Refused/Not applicable	1	1

Q45: Are you paid for ALL the extra hours you work at this job beyond your normal schedule, only for SOME extra hours you work, or for NONE of the extra hours you work

	Union	Non-union
Paid for ALL extra hours worked	74	63
Only for SOME extra hours you work	6	3
NONE of the extra hours you work	17	29
[DO NOT READ] Don't Know	1	1
[DO NOT READ] Refused/Not applicable	2	3

Q46: Is your workplace a single shift operation, a multiple shift operation that is less than 24/7, or a 24/7 operation?

	Union	Non-union
Single shift	38	50
Multiple shift, but less than 24/7	31	30
24/7 operations	30	18
[DO NOT READ] Don't Know	1	1
[DO NOT READ] Refused/Not applicable		1

Q47: Does your company or organization have operations or facilities in only one state, or in more than one state?

	Union	Non-union
One State	47	64
More than one state	50	30
[DO NOT READ] Don't Know	2	3
[DO NOT READ] Refused/Not applicable	1	3

Q48: About how many are employed in the actual facility where you work? [PROMPT - A rough estimate is fine.]

	Union	Non-union
1-25	17	42
26-49	9	9
50-75	10	8
76-100	9	8
101-150	6	4
151-200	6	6
201-300	8	7
301-400	5	1
401-499	1	1
>=500	25	11
[DO NOT READ] Don't Know	6	4
[DO NOT READ] Refused/Not applicable		

Q49: Do you do most of your work as an individual worker or as part of an organized work-team that handles job duties together?

	Union	Non-union
An individual worker	44	37
As part of a work-team	46	50
[DO NOT READ] "Some of both" and similar comments	10	12
[DO NOT READ] Don't Know		1
[DO NOT READ] Refused/Not applicable		1

Q50: How many days paid vacation do you receive as a job benefit each year? [CODE EXACT DAYS]

	Union	Non-union
1-5	6	7
6-10	12	22
11-15	18	23
16-20	9	4
>20	36	20
[DO NOT READ] Don't Know	5	6
[DO NOT READ] Refused/Not applicable	3	1

Q51: Last year, did you take off ALL of the paid vacation days you were entitled to, or LESS than your full entitlement?

	Union	Non-union
Took off all vacation days entitled to	61	58
Took less than full entitlement	34	31
[DO NOT READ] Don't Know	1	4
[DO NOT READ] Refused/Not applicable	4	8

Q52: About how many years seniority do you have? [CODE EXACT YEARS]

	Union	Non-union
0	3	
1-5	24	
6-10	18	
11-15	17	
16-20	12	
>20	25	
[DO NOT READ] Refused	1	
[DO NOT READ] Not applicable	2	

Q53: Do you receive any kind of health insurance benefits from your employer?

	Union	Non-union
Yes	90	72
No	10	27
[DO NOT READ] Don't Know		1
[DO NOT READ] Refused/Not applicable		1

Q53B: [FOR PART-TIME EMPLOYEES] Are these health insurance benefits equal to what full-time employees receive or less?

	Union	Non-union
Yes, equal to	89	92
No, less than	9	3
[DO NOT READ] Don't Know	1	3
[DO NOT READ] Refused/Not applicable	2	3

Q54: Are you married, living with a partner as a couple, single and never married, legally separated, divorced, or widowed?

	Union	Non-union
Married	62	45
Living with a partner as a couple	6	8
Single and never married	17	29
Legally separated	1	1
Divorced	11	12
Widowed	3	3
[DO NOT READ] Don't Know		
[DO NOT READ] Refused/Not applicable		1

Q54B: Does your spouse or partner work full time, part time, or does your spouse or partner not work?

	Union	Non-union
Work full time	66	62
Work part time	12	14
Spouse or partner does not work	21	23
[DO NOT READ] Don't Know		
[DO NOT READ] Refused/Not applicable		1

Q54C: Does your spouse or partner receive health insurance through their employer, or not?

	Union	Non-union
Does receive health insurance through their employer.	61	64
Does not receive health insurance through their employer.	38	33
[DO NOT READ] Don't Know	1	1
[DO NOT READ] Refused/Not applicable		1

Q55: How many children under the age of 18 do you have a major responsibility for, if any?

[CODE EXACT NUMBER]

	Union	Non-union
1-2	34	3
3-4	9	7
>4	2	1
NONE	56	56
[DO NOT READ] Don't Know		1
[DO NOT READ] Refused/Not applicable		1

Q55B: Do you expect to have major responsibility for children in the near future?

	Union	Non-union
Yes	10	16
No	88	81
[DO NOT READ] Don't Know	2	3
[DO NOT READ] Refused/Not applicable		

Q55C: Do you expect to have major responsibility for more children in the near future?

	Union	Non-union
Yes	12	19
No	84	79
[DO NOT READ] Don't Know	3	2
[DO NOT READ] Refused/Not applicable		

Q56: Do you have primary responsibility for supporting or otherwise caring for parents or any elderly or infirm individuals?

	Union	Non-union
Yes	10	12
No	90	87
[DO NOT READ] Don't Know		
[DO NOT READ] Refused/Not applicable		1

Q57: What is the highest level of school you completed? [DO NOT READ CATEGORIES]

	Union	Non-union
Less than high school	4	7
High school graduate	37	31
Some college or trade school, no degree	19	20
2-year associates degree	15	14
4-year college degree	12	17
Graduate/Professional degree	13	11
[DO NOT READ] Don't Know		
[DO NOT READ] Refused/Not applicable		1

Q58: I'm going to read some ranges of annual family income. Please stop me when you hear the category that best describes your and your spouse's current family income from all sources last year—that is, in 2001.

	Union	Non-union
[READ LIST]		
\$15,000 or less	2	9
\$15,001 to \$25,000	6	11
\$25,001 to \$35,000	10	18
\$35,001 to \$50,000	21	21
\$50,001 to \$75,000	30	18
\$75,001 to \$100,000	13	7
\$100,001 to \$150,000	6	4
Over \$150,000	1	2
[DO NOT READ] Don't Know	3	4
[DO NOT READ] Refused/Not applicable	9	7

Q59: Do you consider yourself Hispanic, Non-Hispanic White, Non-Hispanic African-American or Black, Asian or something else? [INTERVIEWER NOTE: IF RESPONDENT ANSWERS WITH MORE THAN ONE CATEGORY, ENTER "something else"]

	Union	Non-union
Hispanic	5	8
Non-Hispanic White	80	73
Non-Hispanic African-American/Black	8	11
Asian	2	2
Something else [Specify]	4	4
[VOLUNTEERED] Native American	1	1
[DO NOT READ] Don't Know		
[DO NOT READ] Refused/Not applicable		2

Q60: Into which of the following groups does your age fall?

	Union	Non-union
18-24	4	21
25-34	16	22
35-44	28	21
45-54	31	25
55-64	17	10
65 or older	3	1
[DO NOT READ] Refused		

Q61: [CODE SEX—DO NOT ASK]

	Unionized Workers	Non-Union Workers
Male	50	51
Female	50	49

[READ]

Thank you very much for your time. Your answers have helped us to know what American workers are thinking and will be used to try to improve workplaces across the country.

