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Beverly Matthews

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This case describes the difficult challenges facing Beverly Matthews as she returned to the workforce after taking time from paid employment in order to spend time with her two children. She desired a workplace that would give her the flexibility to excel in both the work and family domains. Beverly specifically chose the organization because of its award-winning family-friendly reputation and the positive word of mouth from a friend who worked there. Unfortunately, she has encountered a supervisor whose values conflict with the values of Beverly and the organization. Beverly is contemplating her options as the status quo has become intolerable. Readers are also presented with a teaching note as an accompaniment to the case. Numerous options guide instructors on how to enhance student learning using this case study for theory application in organizational behavior and human resource management courses. *Organization Management Journal*, 12: 221–234, 2015. doi: 10.1080/15416518.2015.1104233

Keywords case-study method; gender roles; organizational culture; work–life conflict

"I love you, you love me, we're a happy family . . ." broadcasts Barney, the classic purple dinosaur playing on the newly purchased tablet. As 6-year-old Katie and her little brother Cayden sat mesmerized, holding the device as if they were masters of such technology, Beverly Matthews chuckled as she recalled how challenging it was to navigate the network setup with her mobile device provider. While Beverly was very adept at crunching numbers and operating various software packages, she soon learned that having the new device was of no real benefit without also having a strong wireless signal in the home and on the go. However, these new technologies were the least of this mom's worries. Beverly's mood quickly darkened in stark contrast to the optimistic attitude displayed on the tablet screen, as her thoughts returned to an earlier run-in with a less friendly relic. As Barney the playful tyrannosaur continued to sing, she couldn't help replaying just how she had gotten to this point.

BACKGROUND

She graduated from Hardison College 12 years earlier with a bachelor's degree in finance and eager for the expectedly more exciting world of work. Leaving dorm life and her small college town behind, she moved to Atlanta, GA, and joined the investment firm of Graham & Smithson, LLC. Often working 60-plus-hour weeks and trekking all over the country, Beverly quickly earned the respect and praise of the firm's senior leadership. So much so, in fact, that just 5 years into her career she was offered a significant promotion. While it would come with a nice pay raise, Beverly also knew it would mean a drastic increase in work responsibilities. At this point Beverly was 27 and had recently given birth to her first child. Although she enjoyed her work immensely, and the salary at Graham & Smithson was outstanding, she realized the long hours and brutal travel schedule would certainly make it difficult to spend time with her husband and newborn child. So instead of accepting the promotion she decided to take a break from work altogether and concentrate on raising her young daughter.

"I really appreciate the generous offer and the trust you have placed in me," Beverly told her boss with heartfelt gratitude, "but I am going to have to pass. In fact, I am going to resign from my current position as well." While this decision was a difficult one to make, Beverly realized she only had a small window of time to watch her child grow up.

"Wow, you know you don't have to accept the promotion. You can keep your present job if that's where you'd rather

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be," the managing partner had offered with equivalent sincerity. "I know and I really appreciate it," Beverly replied, "but this situation has actually helped me make a choice about what I want in my life right now."

LIFE HAPPENS

As is frequently the case, external factors often intervene with even the best-laid plans. Some 6 years later, Beverly, then 33, concluded that it was time to go back to work and contribute to her family's income once again.

After leaving Graham & Smithson, Beverly added a second child to her growing family and relocated to Nashville, TN, as her husband accepted the position of national sales manager at Sidco Automotive's corporate headquarters. Although his job required significant travel, Beverly was always at home to take care of the children and most other family-related necessities of contemporary life. Maintaining that modern life, however, became progressively more burdensome. Increases in costs of living combined with private school tuition and a seeming plethora of unexpected house repairs and medical bills placed a financial strain on the Matthews family, causing Beverly to face the reality of an impending return to the corporate world. On one hand, it wasn't terribly problematic, as she genuinely missed the satisfaction that came with accomplishing work-related goals. "It's really not that big a deal," she had thought to herself; "I always planned on returning to work once the children reached school age anyway."

Beverly wanted a job that would give her the flexibility to balance her busy family life. Beverly described her husband as a workaholic who regularly put in a minimum of 60 hours per week. She had long ago accepted that her husband was not going to be as involved in the regular home and child-raising responsibilities as she would have liked. Ideally, she would like the flexibility to drop off her children just before the school bell rang in the morning and pick them up right after school. Moreover, her desire to work was still strong and events beyond her control seemed to be playing her hand to some degree. Beverly knew that she still did not want to miss her children's many extracurricular activities.

A GREAT PLACE TO WORK

While discussing her plans to return to work over a cup of coffee with friends, Beverly was made aware of the family-friendly reputation of Middle Tennessee Bank & Trust (MTB&T). She always knew that her friend Susan worked for MTB&T as an underwriter, but they never talked in depth about what a great place it was to work.

MTB&T consistently received numerous "great-place-to-work" accolades, as well as being named one of Fortune's "100 Best Companies to Work For." Like many other companies on the list, MTB&T offered several family-friendly benefits to assist its employees in balancing their work and family lives. The company believed that offering such benefits was critical if they wanted to be competitive in recruiting top, fresh talent. MTB&T knew that many younger employees placed higher values on family than was common among many of their predecessors, and thus were looking for companies that would offer them some degree of flexibility. Among the benefits offered by MTB&T were various alternative work arrangements and the option to telecommute up to 50% of employee work hours. These policies helped create a welcoming organizational culture and allowed the firm to create what it believed was a considerably sustainable competitive advantage. In support of their assertion, the company's executives consistently received feedback from employee satisfaction surveys letting them know that MTB&T's willingness to assist them in their efforts to balance work and family life led them to actually work harder for the bank.

"You should really look into MTB&T if you're seriously considering going back to work," Susan told Beverly. Intrigued by Susan's positive outlook on her employer, Beverly wanted to know more about what made MTB&T so special. "How do they treat you any better than the other companies you've worked for?" "Well, for starters," Susan said, "my boss doesn't worry about what time I get to the office each morning or if I leave early in the afternoon, so long as I continue to get my job done. Another plus is that the company's policy allows me to work from home part of the time. This really comes in handy if one of the kids is sick and has to stay home from school. It also helps me save a little gas by not having to commute downtown every day." Beverly was very encouraged by what Susan was telling her. "So you mean that you can leave the office in the middle of the work day to handle personal business?" she asked with a hint of skepticism. "Yep, that's correct. But it's not a license to slack off on the job. We still work very hard. But MTB&T realizes that we have responsibilities outside of work and they allow us the freedom to take care of those responsibilities without fear of getting reprimanded. Frankly, because I know the bank cares about my well-being, it makes me want to do the absolutely best job I can for them," Susan added.

Later that evening as she watched television with her kids, Beverly kept replaying her conversation with Susan over and over in her mind. With two young children and a husband who was frequently on the road, Susan's description of MTB&T seemed like just the sort of place for her to be. The pleasant thoughts of working at a family-friendly company, though, were soon interrupted by the disturbing screams of the aforementioned children. The Discovery Channel show about puppies had ended and given way to a show chronicling the dinosaurs of the Cretaceous period. The children's shrieks were the result of a cute-looking herbivore being abruptly eaten by a huge, menacing Tyrannosaurus Rex. With the channel changed to remove the gruesome images and the ensuing bawling having subsided, Beverly returned to her thoughts of going back to work.

After putting the kids to bed Beverly made a quick scan of MTB&T's recruiting website. She quickly realized there were several midlevel positions at MTB&T's Nashville headquarters

that would be a good fit with her skills and abilities and that would not require extensive business travel or extreme work hours. "I think this is it," she said aloud to herself with an air of confidence.

And she was right. Her previous work experience combined with the positive recommendations of her former supervisors at Graham & Smithson earned Beverly a position in the loan accounting department at MTB&T. Her new salary was nowhere near as lucrative and the job title was less prestigious than the one that would have come with the promotion she was offered a few years earlier at Graham & Smithson. Nevertheless, she was confident that her family's quality of life would be enhanced. She would now be able to contribute to the fiscal health of her family without the headache of spending 60 hours per week away from home. "Plus," she considered, "what the job lacks in salary would be compensated by the use of the company's family-friendly benefits."

T-REX

Upon arriving for her first day of work, Beverly was greeted by her new supervisor Thomas "Rex" Gibbs during new employee orientation. He had earned the nickname Rex because of an unfortunate accident that had left him blind in one eye many years before. While it was barely noticeable and created few work-related problems for him, it did mean that he was forced to move his head to and fro when entering the room due to the limited peripheral vision, thus creating the stalking appearance of the popular portrayal of his deadly namesake, always seeking movement so he could devour it. But he didn't mind the name at all. Instead, he seemed to actually relish it. If truth were told, Rex not only approved of the moniker, he thought it an appropriate symbol for one so dominant and firmly in charge.

Beverly had talked with him briefly during the interview process but did not get a good feel for what type of manager he would be; however, he showed no signs that he would be a bad boss to work under. Rex, in excellent physical shape and brawny for his age of 64, had only been with MTB&T for 3 years, as this was his second career after retiring from a nearly 40-year stint at the Arrow Modular Homes plant in Murfreesboro, TN. He began working at AMH while still a student at the local community college and eventually worked his way up in the office from floor plan checker to billing to loan accountant and finally to associate plant manager. His retirement from AMH was a result of downsizing and an early retirement package. However, Rex still felt that he had several years of work left in him. One of the guys he bowled with each week had a relative at MTB&T and was able put in a good word for him.

Although he had spent many years on the credit side of AMH before his successful ascent to general management of an important segment of the plant operations, in effect Rex went from a pretty hard-nosed life at the plant to manager of the loan accounting department at a "great place to work." However, he didn't leave the factory's culture and mentality behind when he left his previous job. He always arrived to work by 7:45 a.m. and never left prior to 5:15 p.m. In addition, he never utilized the company policies that would allow him to work from his home part-time or schedule flexible work hours. In fact, the only time Rex even stopped to eat was when he had a noon meeting with his superiors, preferring to work through lunch on other days. Even though his boss, George Alvarez, vice-president of operations, was an advocate for MTB&T's family-friendly policies, Rex had never seen much value in the benefits.

LET'S HAVE A TALK

Because of those benefits, however, Beverly was really enjoying her new job. She figured out just the right schedule that allowed her to take care of her kids while also excelling on the job. She typically began running her daily reports each morning at 5:00 a.m. from home, stopping at 7:00 a.m. to get her children ready for school. After she dropped them off at school she was normally in her cubicle at MTB&T by 8:30 a.m., where she worked until approximately 3:00 p.m. At that point Beverly would leave the office in order to be at her children's school to pick them up by 3:30 p.m. Occasionally she left during the day to go eat lunch with her children or to see them in a school play, as those things were very important to her. However, she was always careful to make up the work she missed during the workday, and she never turned in a report late to Rex. In fact, most of her reports were submitted prior to the formal deadlines.

One morning as Beverly entered the office she passed by Rex in the hall. It was roughly 8:40 a.m., and she had just dropped off her children at school and stopped by the local coffee shop to get a morning pick-me-up. As she walked past Rex and cheerfully said hello, he retorted gruffly, "Stop by my office later this morning and let's have a talk." "Sure," Beverly agreed and assumed that he most likely had a question about a report or some other work-related duty. However, when she met with him later in the morning, she quickly realized that this wasn't the case.

Without asking her any questions about why she kept the schedule she did, Rex jumped on Beverly for arriving "late" (i.e., after 8:00 a.m.) each morning and leaving "early" (i.e., before 5:00 p.m.) in the afternoons. "Do you think you can just come in late every morning and it would go unnoticed?" he said with a tinge of resentment in his voice. "I'm here every morning well before eight o'clock but you're nowhere to be found and when I leave at the end of the day you are long gone and that just won't cut it with me."

Beverly began to understand how that tiny herbivore must have felt when blindsided by the menacing T-Rex on the television show. However, this time there was no changing the channel. She was shocked and taken aback by Rex's hostile tone but managed to keep her composure. "Well, I get up early and work from home while my kids are still sleeping. Then I take them to school before coming into the office. And most afternoons I like to pick them up from school," she offered in a

rather defensive tone. "Maybe you should think about getting a babysitter or putting your kids in an after-school program. That should help you get to work on time," Rex suggested clumsily. Close to tears Beverly exclaimed, "But Rex, the company's family-friendly benefits are set up for situations just like this! They allow employees like me to take care of family responsibilities!" "The bottom line," Rex replied matter-of-factly, "is that I'm your boss and you need to be here on time from now on or your evaluation will not be as good as you probably want it to be." With that warning, the surprise attack was over and he walked out of his office to his next meeting.

Beverly left the brief encounter feeling hurt and very frustrated. All she could think of were the positive things Susan had said about her experience at MTB&T and all the great publicity she had seen about the company being a great place to work due to their family-friendly benefits. After all, that was the main reason she decided to seek employment with the organization. If she had to be locked into the traditional 8–5 workday that Rex was demanding, she could do so somewhere else and make a lot higher salary in the process. Another thing that discouraged Beverly was that at no point during the conversation did Rex even mention the fact that she routinely performed duties outside of her formal job description, such as volunteering to lead a task force on helping the company "go green." Rex, on the other hand, was more concerned about when and where she was and seemingly ignored her contributions to the company.

NEXT STEPS?

Clearly, Beverly was shocked by her supervisor's notion that she shouldn't take advantage of the company's family-friendly benefits. After talking to other employees in her department she soon recognized that she was not the only one that had received "the speech" from Rex. Rebecca Rubenstein, one of the department's longest tenured employees, who had succumbed to Rex's demands, argued that it seemed as if he just didn't want anyone in the department to utilize the benefits offered by MTB&T. "What do you mean 'I can't use my family-friendly benefits?'" Beverly asked with mounting incredulity. "What's the point of having these benefits if we aren't allowed to use them?" Her thoughts raced back to her conversation with the technology store sales representative a few months back. Having the best tablet in the world was useless without proper wireless access. Apparently, having an award-winning family-friendly reputation was also futile with an outdated intermediary.

In fact, most of the employees in the loan accounting department were reluctant to use flex-time, work from home, or any of the other family-friendly benefits because they were worried that Rex would rate them low on their formal appraisals. Yearly merit pay raises were based on those employee evaluations, so he was able to use that as leverage to force his department to conform to his traditional routine.

"What should I do?" Beverly thought to herself. "I can't just let this simmer; I have to do something." Her first inclination was to talk one-on-one with Rex's boss George, who encouraged employee usage of the family-friendly benefits. But Rebecca had gone that route previously to no avail. Senior management thought very highly of Rex, as they could always count on him to meet any demands placed upon him. "Trying to offer benefits that fit everyone is very difficult," George had told Rebecca. "Remember when we first offered health insurance for our retirees? You loved it but the younger employees didn't really see it as much of a benefit because it was too far away. Likewise, when we began offering first-time homebuyer assistance, the younger staff members were ecstatic but many of our more seasoned employees were indifferent at best. Rex is a good guy and an effective manager. He's just from a different generation. You are all professionals, I'm sure you can work it out," George had offered with confidence.

Besides, Beverly figured that George would most likely just have a conversation with Rex about the importance of the benefits, which would offend him and lead to even lower scores on her evaluation. She could also have a one-on-one meeting with Rex and try to find out why he wants the employees to stick to the strict 8–5 schedule but that seemed unlikely to be fruitful. "Or would it be wise to try to get the rest of the department to join me in a departmental meeting with Rex?" she pondered. She knew he was violating company policy but if he were reprimanded for his actions he might just take it out on all of his employees through the evaluation process. "Plus," she considered, "do I really want to carry the baggage that would occur from such a perceived mutiny?" She wondered how the human resources department might intervene to resolve the situation but feared being identified as some sort of malcontent. She realized that supervisor support of employees' desires to use family-friendly benefits was the key to whether a company's family-friendly benefits would help employees balance work and family life. "But MTB&T's family-friendly policies are ineffective if supervisors like Rex are allowed to decide when and if employees can use them," she concluded.

"Maybe I should just quit," she groaned with a mounting feeling of helplessness, as the options available all seemed fraught with danger. "Of course if I did, then the company and my family would be the losers," she supposed. "There has to be an effective way of doing this where everyone can be satisfied," she said aloud. Even though her options seemed limited, Beverly knew she would need to quickly develop an action plan. As she began escorting her little ones off to bed, her eyes immediately locked in on the clock. "And I only have a few hours to come up with it," she sighed.

BEVERLY MATTHEWS (TEACHING NOTE)

Case studies offer students the opportunity to wrestle with the complex nature of living and breathing in organizations while learning and applying relevant concepts and theories (Argyris, 2002; Bailey, 2002; Diamantes & Ovington, 1995; Ellet, 2007; Garvin, 2007). There are many teaching and learning possibilities associated with this case study, but in this

teaching note we have focused on using the case as part of an in-class discussion. We encourage users (instructors and students alike) to experiment with the complex challenges facing Beverly, Rex, and the entire organization. Other options for using this case might include a written case analysis assignment, short-essay exam questions, in-class role plays, and animated, student-generated video cases that depict alternative tactics for the characters involved (see Stratton, Julien, & Schaffer, 2014). Please contact the authors for further information on these additional uses for the case.

Case Synopsis

This case describes the challenges facing Beverly Matthews as she returned to the workforce after taking time from paid employment to spend time with her two children. She desired a workplace that would give her the flexibility to excel in both work and personal life domains. Beverly specifically chose the organization because of its award-winning family-friendly reputation and the positive word of mouth from a friend and colleague employed at the company. Unfortunately, she encountered a supervisor who did not share those same values espoused by the organization. Beverly is contemplating her options as the status quo has become intolerable.

Course and Levels

We have used used this case effectively in human resource management (HRM) and organizational behavior (OB) courses at both the undergraduate and graduate levels. This case covers topics in HRM such as performance management and training/orientation. Topics in organizational behavior include power and politics, gender roles, and organizational culture. Note that due to the versatility of the case, we have divided the teaching note into two sections. Section A offers a detailed teaching plan and debrief instructions for an HRM course, while Section B is designed to assist instructors choosing to implement the case in an OB course.

SECTION A (HRM)

Learning Objectives

1. After the in-class discussion, students will be able to identify the difference between face time at work and productive time.
2. After the in-class discussion, students will be able to recall key principles of performance management, including developing SMART objectives, recognizing the importance of providing regular and consistent feedback, identifying performance appraiser biases, and identifying three different types of appraisal systems (ranking, rating scales, and outcomes).
3. After the in-class discussion, students will be able to apply the Instructional Systems Design (ISD) model (Saks & Haccoun, 2010) to evaluate whether or not supervisor training will help teach managers how to be more supportive of their direct reports' attempts to balance work and family.

Suggested Teaching Plan

The following lesson plan (summarized in Table 1) affords instructors and students the opportunity to achieve the aforementioned learning objectives. As an additional resource, the concepts illustrated in this case are featured in most introduction to human resource management textbooks (e.g., Zinni,

TABLE 1
HRM suggested teaching plan (designed for a 75-minute class)

Discussion outline	Plan	Suggested timeline
Case introduction	Instructor asks a student to provide a brief overview of the case including a summary of the issues.	5 minutes
Initial brainstorming	Instructor asks students to organize into small groups and develop for some examples of work-life conflict they've experienced (if any).	15 minutes
Analysis and recommendations	Instructor asks students to divide into groups of three or four to answer the discussion questions listed.	40 minutes
Debrief	Provide any clarification about course concepts. Link the learning objectives back to the discussion questions and the key course material on training and performance management. Can the students differentiate between face time and productive time? Can the students recall the fundamentals of effective performance management? Can the students apply the four-step ISD training model and conclude that perhaps Rex may be too resistant to changing his mind and thus training would be ineffective?	15 minutes

Mathis, & Jackson, 2011) and can be found in the chapters focused on performance management and training. Instructors wishing to learn more about what organizations can do to support their employee's efforts to balance work and nonwork responsibilities may wish to consult a series of well-researched Canadian reports (i.e., Duxbury & Higgins, 2003) and the work of Families and Work Institute in the United States (e.g., Bond, Thompson, Galinsky, & Prottas, 2003). We have included some suggested discussion notes for the instructor in the following.

Suggested Discussion Notes for Teaching Training and Performance Management

We recommend that instructors take one class period (e.g., 50–75 minutes in length) to introduce and discuss key performance management topics, such as different performance management systems, various biases that impact the appraisal process, and setting SMART performance objectives. Instructors may also wish to lecture on the steps in the training model with particular attention paid to diagnosing the training needs.

Most human resource textbooks (e.g., Dessler, Chhinzer, & Cole, 2014) will provide this information, but we have provided a summary of key concepts from the performance management and training chapters.

Instructors need to help students understand that training and performance management are linked together. A sample definition of training may be "the process of teaching employees basic skills/competencies that they need to perform their jobs" (Dessler et al., 2014, p. 214). Performance management may be defined as "the process encompassing all activities related to improving employee performance, productivity and effectiveness" (Dessler et al., 2014, p. 262).

Thus, we have found it useful to begin with the performance management chapter so the students have a good grasp of some of the issues involved in performance management, for example, what constitutes a valid and reliable performance management system, how does a supervisor conduct an effective performance appraisal interview, what might bias a supervisor's assessment, what are the legal implications inherent in performance management, and who should do the appraisal (i.e., the immediate supervisor or a 360-style appraisal where there are multiple appraisers).

It is important for instructors to talk to students about the importance of an appraisal system that is reliable and valid. In other words, a reliable performance system will produce consistent ratings for the same performance results. A valid performance system is based on job-related relevant criteria. Therefore, it might be useful for the instructors to focus on SMART performance objectives. These objectives should be Specific, Measurable, Attainable, Relevant, and Time-bound in order for the employee to have a clear idea of what's expected.

Instructors should highlight that the formal appraisal interview should not contain any surprises. Regular and consistent feedback focusing on both what the employee has done well and what he/she did not do well is very important.

Most HR textbooks will have more detailed information about various forms of appraisal methods, but the main three are ranking, rating scales, and objectives. You will often see organizations using a hybrid of these methods. Ranking involves simply ranking the performance of an employee relative to others in his/her department and some companies such as General Electric have used forced distribution to allocate performers into top performers, good performers, mediocre performers and low performers. Rating scales (e.g., Behavioral Anchored Rating Scales) take job-related performance criterion and rate the employee performance from excellent to poor based on this criterion. Systems using objectives such as Management By Objective (MBO) explicitly create an objective that the employee must reach. MBO works well for project or sales-oriented jobs.

Instructors could also highlight various biases that may occur during the appraisal process as seen below:

Addressing the importance of proper supervisor training is an additional topic so that students learn how to conduct effective appraisal meetings and are aware of some of the aforementioned biases. Some organizations have moved away from a traditional model of the immediate supervisor conducting the appraisal in favor of a 360-appraisal model. In such a model, other key stakeholders in addition to the supervisor, such as peers, subordinates, and clients, give their feedback on performance.

Dessler et al. (2014) and other HRM textbooks offer helpful hints on conducting effective performance appraisal meetings, including:

1. Be direct and specific by focusing on objective work data and specific incidents (either good or bad).
2. Do not get personal (e.g., you're too slow in producing the report); merely focus on the performance standard and the gap in performance.
3. Encourage the person to talk by giving the person an opportunity to share what they feel went well or did not go well this year. Ask the person what they need to perform at a higher level.
4. Develop an action plan that will redress performance issues by clearly stating what will be done and how improvement will be measured (pp. 283–284).

Once students understand issues associated with performance management, the instructor can help the students understand that if there's a performance issue with an employee, there are various potential interventions to help the employee improve. According to Saks and Haccoun (2010), training has the potential to improve employee performance only in three situations: lack of skill, lack of knowledge, or if there's an issue with attitude. If the performance issue is not associated with the three aforementioned situations, instructors should mention to the students that supervisors must examine nontraining solutions to improve performance. For example, perhaps the employee lacks the resources, is unclear about performance

objectives or why their task is important, is not motivated, or has personal problems, or the reward system does not support the current level of performance.

Another suggestion would be to engage students about their own experiences with training sessions they've attended. What made it so ineffective or effective? If students have not attended much training, you could shift the question to focus on their university experience to see whether there are some commonalities between students' good training/classroom experience and their bad training experience. To this effort, we found it helpful to introduce to the students the Instructional Systems Design (ISD) model (Saks & Haccoun, 2010). Most HRM textbooks use this format to cover the training model.

Step 1: Need analysis (what is the performance gap between actual performance and expected performance; is this performance gap attributable to training?). It is imperative that students understand that only in cases where there is a lack of knowledge, lack of skill, and an issue with attitude will training help. Instructors may wish to have students provide non-training-related reasons why performance might suffer (e.g., personal reasons, motivation, lack of proper supervision, lack of rewards, lack of necessary resources).

Step 2: Design (issues that may emerge is the ability to learn, different learning styles, adult learning principles such as repetition and providing context).

Step 3: Delivery (which methods to use considering the time required to develop and deliver the course, the budget, and the educational background of the trainees).

Step 4: Evaluation. The four levels include reaction, learning, knowledge/skill transfer from classroom to workplace, and cost-effectiveness.

Performance Management

The case speaks to an apparent disconnect between Beverly's perception of her performance and her supervisor's perceptions. Instructors may wish to focus on the various performance rating biases/problems that supervisors may experience with a particular emphasis on the two biases that Rex appears to be experiencing (i.e., unclear performance standards, halo/horn). For example, it would appear that Rex is emphasizing "face time" when he requires employees to physically be at work between certain times of the workday without regard to whether or not the work is being completed (unclear performance standards). This also supports the notion that Rex has experienced the halo/horn effect where he has emphasized one negative aspect of Bev's performance (i.e., his perception that she is coming in late and leaving early) and is letting this perception influence his entire rating of her performance.

Instructors may wish to differentiate between various performance management models featured in the HRM textbook chapter on performance management. While the case does not specify which performance management system is used (e.g., Management By Objectives, Behaviorally Anchored Rating Scales, Ranking, or Graphic Rating Scale), the instructor may wish to highlight the advantages and disadvantages of each method. Instructors may wish to ask students whether they have experienced a situation where they were rated negatively on an irrelevant performance criterion or rated by a biased supervisor. This could then help instructors lead students in a discussion on SMART (Specific Measurable, Achievable, Relevant, Time-Bound) performance objectives. Students could then to develop a SMART performance objective for either Beverly or Rex.

Training

This case offers rich evidence for instructors to discuss the potential benefits and challenges associated with designing and using training as a tactic to address work-life conflict. In order to explore the efficacy of training in this situation, instructors will find it helpful to refer students to the Instructional Systems Design model found in most introductory HRM textbooks. This model asks the decision maker to (a) conduct a needs analysis, (b) design the training program, (c) deliver the training program, and (d) evaluate the training program. The ISD makes it clear that only in three situations where performance is lacking will training potentially help improve performance (i.e., lack of knowledge, lack of skill, problem with attitude). Therefore, students should be directed to consider whether or not Rex lacks knowledge and/or skill or has an attitude problem with respect to work–life balance/conflict, gender roles, and what helps employees support work–life balance, including supportive organizational culture, coworkers and supervisors, and schedule flexibility. It would appear there is a disconnect between the organization's reputation as family-friendly and what is occurring at a micro level between Rex and his subordinates. Therefore, students should use the ISD to propose how someone in the HR department may wish to diagnose this performance issue with Rex.

Discussion Questions for Preliminary HRM Analysis

The following questions and possible points of analysis to share with, and anticipate from, students will further help connect the performance management and training concepts with evidence from the case. While this is not an exhaustive list of discussion questions, they do offer a starting point from which instructors and students can explore the complex nuances of the case. We have had the students divide into groups of four or five and prepare responses for each question. The instructor has then opened up each question for discussion and solicited the ideas from each group of students. Then, as indicated in the following, there may be time for follow-up questions to be asked, which then lead to more discussion about the relevant topics (e.g., see second question that follows).

What would you do if you were Beverly? In your answer, develop a list of alternatives and the advantages and disadvantages of these alternatives. Each of the following potential

TABLE 2
Sample appraisal biases

Sample appraisal biases	Definition
Central tendency	Tendency to appraise most employees as average (e.g., receiving a 3 out of 5 when the employee deserves a higher or lower rating). Usually associated with a supervisor who has not conducted regular feedback or has not been closely involved in supervising his or her employees' work.
Horn/halo	Tendency to appraise someone higher (halo) or lower (horn) based on one particular aspect of their performance and not factoring in their total performance. For example, an employee who shows up late occasionally but is still a highly effective performer receives a lower rating.
Recency/primacy	Tendency to give a rating based on the most recent work of the employee (either good or bad) or primacy (the first impression the employee made at the start of the appraisal period).
Strictness/leniency	Tendency to rate an employee higher than deserved (leniency) or lower than deserved (strictness).

options for Beverly present important advantages and disadvantages that should be explored and debated. These are summarized in Table 2.

In our experience, students tend not to advocate for the status quo. Students tend to recognize the negative impact of Bev's relationship with Rex and understand the potential impact on Bev's future career with the firm. Students have tended to advocate for a transfer or quitting in order to find another job.

What performance appraisal biases does Rex demonstrate in this case? Rex is emphasizing "face time" where he is requiring employees to physically be at work between certain times of the workday without regard to whether or not the work is being completed (unclear performance standards). This also supports the notion that Rex has experienced the halo/horn effect where he has emphasized one negative aspect of Bev's performance (i.e., his perception that she is coming in late and leaving early) and letting this perception influence his entire rating of her performance. Some students with work experience have spoken about their experiences with being penalized for not putting in enough "face time" in their jobs or how it was made clear how their organization and/or supervisor equated face time with organizational commitment.

Once students have responded to this question and the instructor has made clear the possible performance appraisal biases and the difference between face time and productivity, instructors may follow up with the class and ask them whether they think there are jobs/situations where it's appropriate to enforce a "face time" standard in the workplace. There are jobs such as receptionist, teacher, and service personnel where people physically must be at work on time in order for the organization to be effective. Another follow-up question for the students to consider is whether Rex may be discriminating against Beverly. Instructors may wish to ask students if they think there's a double standard for working mothers (compared to the standard for working fathers). This question is explored more fully in the OB section of this teaching note. Graduate students who are mothers have often told stories in class about discrimination they have experienced (relative to their male counterparts) and have discussed how society still seems to have a double standard when it comes to child care and household chores. Males often perform household chores that are infrequent such as lawn care or snow shovelling, while women tend to perform the chores that require the most frequent level of activity (e.g., cooking, cleaning). Many female students have talked about how their partner does help out with the children but that the proportionate amount for child care falls mainly with them.

Do you think that training the supervisors (such as Rex) will improve the situation? In order to effectively answer this question, students will need to apply the ISD model (as explained earlier in the teaching note) that specifies that before we recommend training, we need to do a needs analysis of the situation. Students should discuss whether or not there is a lack of knowledge, lack of skill, or an issue of attitude about work–life balance/conflict with the supervisors. Instructors may wish to ask the students whether the decision to develop a training program will be contingent upon how many supervisors lack the knowledge or skill to understand how work–life conflict impacts the workplace or how many supervisors value face time over productivity. The case speaks to the fact that Rex knows that work–life balance policies exist but he does not seem to see any value in them. Perhaps students will make an argument that providing knowledge about the benefits of such programs may help Rex. Instructors may wish to also lead a discussion of how organizational culture may be an issue. For example, the organization may face a problem where there is a distinct difference between the espoused values of the organization (i.e., family-friendly) with misperceptions that such policies may limit productivity. Instructors may wish to direct students to further readings on the topic of organizational culture and work–life conflict (e.g., Duxbury & Higgins, 2005; Maume & Houston, 2001; Thompson, Beauvais, & Lyness,

TABLE 3
The options and implications for Beverly

Alternatives	Advantages	Disadvantages
Status quo (Do nothing)	Not risking her career	Continued high levels of work–life conflict, potentially leading to health consequences and a decrease in family functioning
Approach her boss	If handled properly, situation resolved if her supervisor sees that the work is getting done	May exacerbate the situation and make things worse, may risk receiving a bad performance evaluation
Approach her boss's supervisor	May be more sympathetic to her dilemma	Case notes that the boss's supervisor thinks his subordinate is doing a good job; risk of end running the supervisor and leading to a deterioration of the relationship
Quitting	Leaves her stress behind, may be able to find better job elsewhere	Does not resolve situation for other employees, employer may not know why she is leaving, risk getting a bad reference, may face financial distress in the short term, may not be able to find a family-friendly employer
Transfer	Continued employment with an organization known for its flexibility; may get a better supervisor	Unknown whether or not new situation will be any better or may be worse if Beverly does not do her homework about the new department/supervisor

1999). Typically, students have been able to relate examples of their own work experience where an organization espouses a certain value (e.g., teamwork) and yet in practical terms that espoused value was not actually practiced in the workplace (e.g., the reward system was focused on individual contributions). Students have stated that they don't feel that training will help Rex. Students feel he has too many preconceptions about what behaviours are important for the workplace (i.e., showing up on time, putting face time into work). Thus, students will often talk about how senior management must do a better job of trying to create a family-friendly workplace. The discussion here often then flows into students' responses for the next question.

What HRM-related recommendations should the organization implement to improve this situation? Students should suggest that the organization needs to understand how widespread the problem of work–life conflict is and whether there are other employees who feel the same way as Beverly. The organization could start by conducting an employee survey and/or focus groups, as well as ensuring that exit interviews are conducted. The organization must also ensure that senior management is leading by example and is ensuring that they do not send the wrong messages by constantly putting work ahead of family. The organization could expand the criterion used to measure their supervisors' performance. For example, some measure of how well supervisors are helping support their employees' efforts to balance work and family may send a clear message about what the organization values. The instructor should also emphasize the crucial role evaluation plays in assessing the success of HRM. In other words, students should reflect on what metrics the organization could looks at to demonstrate that the recommendations the students developed in considering the third question were successful. Such measures would include turnover, absenteeism, employee productivity, and whether or not the organization met its goals of profitability and market share.

SECTION B (OB)

Learning Objectives

1. After the in-class discussion, students will be able to identify the gender role expectations about work and nonwork responsibilities such that men are still assumed to be the main breadwinner and women are still expected to perform the majority of the household and child care duties.
2. After the in-class discussion, students will be able to recall the six sources of supervisor power and apply these sources to the relationship between Bev and Rex.
3. After the in-class discussion, students will be able to recall at least three political tactics that Bev may apply to resolve this issue.
4. After the in-class discussion, students will be able to identify the conflict between the espoused values of the organization and the subculture within Bev's department and provide some recommendations for resolving this disconnect.

Suggested Discussion Notes for Teaching Gender Role Theory, Power and Politics

It is suggested that instructors may wish to take one class period (e.g., 50–75 minutes in length) to introduce and discuss related topics such as the organizational culture, the six power bases and various political actions with the advantages and disadvantages of each political action. Most organizational behavior textbooks (e.g., Bolman & Deal, 2013; Langton, Robbins, & Judge, 2010) will provide this information, but we have provided a summary of key concepts. Instructors should also provide an overview of gender role theory and the traditional assumptions that society has made about the role of men and women and the work done inside and outside the home. Instructors may also wish to include other seminal readings on power and politics such as Pfeffer (1994, 2010), DuBrin (2009), Cropanzano and Grandey (1998), and Ferris, Davidson, and Perrewé (2005). Instructors may wish to cover topics such as levels of culture (values, artifacts, and shared assumptions), symbolism, metaphor, socialization and internalization processes, and dramaturgy. While a chapter on organizational culture in a traditional textbook may suffice, instructors may want to consider additional readings such as work by Edgar Schein (1996) or Lee Bolman and Terrance Deal (2013), among others (Greenwald, 2008; Huzzard & Ostergren, 2002; Lewis, 2001). The seminal article by Gutek, Searle, and Klepa (1991) provides an instructive overview on gender role theory. For an interesting article about the challenges of working mothers, instructors may wish to assign the *Atlantic* article by Anne-Marie Slaughter entitled "Why Women Still Can't Have It All" (Slaughter, 2012). For further information on generational differences pertaining to perceptions of work–life conflict, instructors may wish to consult Beutell and Wittig-Berman (2008).

Power and Political Tactics

Instructors may wish to start by discussing the six bases of power that employees, supervisors, and managers can display in an organization (Bolman & Deal, 2013; DuBrin, 2009; Langton, Robbins, & Judge, 2010; Pfeffer, 1994, 2010):

> *Legitimate power* refers to power of an individual because of the relative position and duties of the holder of the position within an organization. Thus, an employee responds to a supervisor's legitimate request to perform a task because the person is the employee's supervisor.
>
> *Referent power* means the power or ability of individuals to attract others and build loyalty. It's based on the charisma and interpersonal skills of the power holder. Steve Jobs is widely cited as someone who had referent power because of his charisma.
>
> *Expert power* is an individual's power deriving from the skills or expertise of the person and the organization's needs for those skills and expertise. Often people will defer to those in an organization with information systems expertise because these people have valuable skills required by the organization.
>
> *Information power* is the ability of someone to stay well informed and up-to-date and also to have the ability to persuade others. The maxim about knowledge being power is apt here. Often an executive assistant has key insider information and thus this gives him or her power.
>
> *Reward power* depends upon the ability of the power wielder to confer valued material rewards; it refers to the degree to which the individual can give others a reward of some kind, such as benefits, time off, desired gifts, promotions, or increases in pay or responsibility. For example, a supervisor may have the discretion to use their reward power to elicit extra effort from his or her subordinates during a busy time of year by providing extra time off once the project is complete.
>
> *Coercive power* means the application of negative influences onto employees. It might refer to the ability to demote or to withhold other rewards or to dismiss an underperforming employee.

Organizational actors use political tactics to attempt to gain what they want (Bolman & Deal, 2013; DuBrin, 2009; Langton et al., 2010; Pfeffer, 1994, 2010). Such tactics may include:

1. Rational persuasion (appealing to facts and data to make a logical argument).
2. Inspirational appeals (appealing to values, feelings, or ideals).
3. Consultation (consulting others to support one's goals).
4. Ingratiation (using flattery to create goodwill).
5. Personal appeals (appealing to loyalty or friendship).
6. Exchange (quid pro quo, offering a favor in exchange for support).
7. Coalitions (getting support of others and presenting a united front).
8. Pressure (using demands or threats).
9. Legitimacy (claiming authority or showing how the proposed action supports organizational goals).

Organizational Culture

Organizational culture is the "pattern of shared values, beliefs, and assumptions considered to be the appropriate way to think and act within an organization" (Langton et al., 2010, p. 376). There are visible manifestations of organizational culture in the language, symbols, stories, and rituals in the organization. Most confusing for new employees are the layers below the surface of organizational culture, the unspoken norms of the organization. Adding to the confusion is the presence of subcultures within the organization. Thus, an organization may have espoused values as seen in this case (i.e., family-friendly organization) on a macro level but there may be a subculture or subgroup that defies these values (e.g., Rex's department, where family-friendly benefits are not being used because of Rex's personal beliefs and values).

Gender role theory suggests that society sees men and women performing different primary roles. Historically, men have been seen as the breadwinners and women the primary caregivers. Despite the progress made from generations of women working outside the home and the high-profile success stories of some women (e.g., Sheryl Sandberg, Marissa Mayer), there is much data from national studies (e.g., Bond et al., 2003; Duxbury & Higgins, 2003) to indicate that women still perform

the majority of the child care and household tasks relative to their partners.

OB Teaching Strategy

This case can be used in conjunction with a course in organizational behavior. It is suggested that students be given this case before class. Student reading-time for the case is approximately 30–45 minutes. Classroom discussion may last 50–75 minutes. The teaching plan is summarized in Table 3 and gives instructors and students the opportunity to achieve the aforementioned learning objectives. Instructors can divide students into small groups of three or four students and have them answer each question as a group. Then the instructor can facilitate the discussion to see whether the groups have similar answers to the questions. The instructor can refer back to the key material assigned in conjunction with the lecture material and see whether the students can apply this material to the case. Instructors may find it helpful to write the questions on the board and then provide some summary points to each question as each student group provides a verbal response. In our experience, there tends to be a good deal of consensus in the answers to the questions as we've highlighted in the next section of the teaching note, where we offer specific answers to the discussion questions.

Instructors may find that the answers vary depending on the experience level of the students (e.g., undergraduates vs. MBA) and that many undergraduates have limited experience with balancing work and family. However, mature students and MBA students will often have stories about their struggles with work–life balance. We have found that while many organizations espouse being family-friendly, the reality is different in the stories the students have shared. Many students talk about working in excess of 60–80 hours weekly and feeling burned out. Students will often be able to relate to gender role assumptions both from their partners and from their supervisors.

Discussion Questions for Preliminary OB Analysis

While this case could be used to learn and apply numerous organizational behavior concepts, theories, and best practices, the following guided discussion questions and possible points of analysis will help focus instructors and students on the particularly relevant content. We envision that additional topics and discussion questions will emerge as part of an engaging and iterative learning process among students and the instructor.

Do you think Beverly's gender matters? Do you think men still have it easier when it comes to what society expects of men and women with respect to nonwork responsibilities? This question should elicit some good discussion depending upon the life-cycle stage of the students in the classroom. Students without family responsibilities may not be aware of some of the challenges that other students face with respect to elder care, child care, or other family responsibilities. Students have often shared their own stories of juggling multiple responsibilities. Instructors should talk about what are the stereotypical roles assigned to men and women in our society and whether those roles are evolving or are still entrenched. Certainly, there is a great deal of academic literature that suggests women report higher levels of work–life conflict (than men) (e.g., Duxbury & Higgins, 2003), although the rates of work–life conflict for men are increasing, and that both genders are time starved

TABLE 3
OB teaching strategy (sample time frame for a 75 minute class)

Discussion outline	Plan	Suggested timeline
Case introduction	Instructor asks a student to provide a brief overview of the case including a summary of the issues.	5–10 minutes
Initial brainstorming	Instructor asks students for some examples of work-life conflict they've experienced.	15 minutes
Analysis and recommendations	Instructor asks students to divide into groups of 3–4 to answer each question.	35 minutes
Debrief	Provide any clarification about course concepts. Link the learning objectives back to the discussion questions and the key course material on training and performance management. Can the students recall gender role theory and the traditional assumptions about men and women? Do they think these assumptions are changing? Can the students recall the political tactics and the six bases of power? Can the students demonstrate how the role of organizational culture may play a role in this case and demonstrate how subcultures can differ from the overall organizational culture?	15 minutes

(Bond,Thompson, Galinsky & Prottas, 2003). Instructors with predominantly undergraduate students can see what the students' views are about balancing work and family and whether they foresee a time when men and women are performing approximately the same level of nonwork responsibilities. Young women often make assumptions that the challenges faced by their mothers and grandmothers have disappeared and may not believe a glass ceiling still exists. Most students are clear that they want partners where they can share the child care and housework responsibilities, but we have had some students who hold very traditional assumptions about the nature of gender roles. Instructors may also wish to explore what factors may influence possible parity in responsibilities (e.g., job type, socioeconomic status, availability of family members to assist, traditional gender views from parents and/or the community they live in).

Instructors may wish to point out that there is evidence to suggest that perhaps Rex is making assumptions about what a good mother is and how Beverly is violating those assumptions by working full-time outside the home. Instructors may wish to ask the class whether Rex would handle this interaction in the same manner with a male employee who may have been late for other reasons.

Gender role theory (Gutek et al., 1991) would suggest that society still expects women to do the lion's share of the housework and child care. Instructors may wish to explore with the students what their understanding is of gender roles within their own lives and the lives of those in the community they live in. Instructors may wish to discuss what assumptions are made about working mothers and working fathers and some of the differences between these two groups. While it is rare to hear people talk about a working father's commitment to his children, there is often a societal debate about the role of working mothers, particularly those in high-pressure, high-profile jobs (e.g., Marissa Mayer). This point has led to a vigorous discussion about Mayer's decision to ban telecommuting at Yahoo. Half the class was supportive of her decision and half was not.

Discuss which power bases Rex is currently using. Do you think he's being effective? This case points to some relevant topics for discussion, including power sources, influence tactics (both supportive and counterproductive in nature), and political skill assessment. Instructors may wish to review the six bases of power developed by French and Raven and illustrated in most introduction to organizational behavior texts (e.g., Langton et al., 2010). It would appear from the case that Rex is using power bases such as legitimacy (do as I say because I am your boss) and coercion (do as I say because I will give you a bad appraisal rating). Students often respond by saying that Rex is using legitimacy and coercive power bases. Some students will also state that those in Rex's department who played by the rules and demonstrate sufficient face time seem to be able to get good performance ratings.

It becomes quite clear from the case that Rex is ineffective because Beverly is demotivated, struggling to balance her work and family responsibilities and unsure of how to respond. Beverly may leave the organization, which would represent a loss of human capital and loss of the time invested in her.

Discuss which political influence tactics Beverly should use. Which tactics should she not use and why? Given the sensitivities of the situation, the fact that there is a power imbalance between Beverly and Rex, and the fact that Rex's boss feels Rex is doing a good job, these limit Beverly's options for political influence tactics. Langton et al. (2010) note that rational persuasion, inspirational appeals, and consultation tend to be most effective, while pressure was rated the highest risk and least effective.

Beverly may wish to try low-risk strategies such as rational persuasion and legitimacy. Beverly could present a brief summary of the decades of research that supports the proposition that employees with more perceived flexibility report lower levels of work–life conflict and that lower levels of work–life conflict have significant benefits for the employee (i.e., lower levels of stress, higher levels of physical well-being) and for the employer (i.e., lower levels of absenteeism and turnover) (Bond et al., 2003; Duxbury & Higgins, 2003). Given Rex's preconceptions, it is uncertain that this approach will work.

Beverly may feel her next step is to form a coalition and/or engage in consultation with those also affected. While it would be high risk for her and others to approach Rex's boss, there may not be any benefit to the status quo. Students are dubious that a coalition strategy will work. Students will often talk about how they would ask for a transfer out of Rex's department or quit this job because many students say they are averse to conflict. Lastly, it is unlikely given Rex's history that ingratiation or personal/inspirational appeals may work. Also, it is unlikely that Beverly has any leverage to put pressure on Rex.

Discuss how the organizational culture of the overall organization differs from the subculture in Rex's department. Beverly is a new member of an organizational culture that espouses the importance of balancing work and family demands. Yet she works within a department subculture that doesn't necessarily share those same values. The cultural incongruence within MTB&T is problematic on a number of levels for all parties involved. This is a clear and present danger for the organization, but also for Beverly as she begins to question her fit as she is socialized into the department subculture.

This case points to the differences between Rex's former organization, which was focused on a culture of choosing work over family and valuing face time at work. Rex and Beverly's current organization espouses being family-friendly, but there are subcultures within the organization and differences in how different departments support their employees' work–life balance.

It is clear there's a conflict between the espoused values of the organization about flexibility and balancing work–life responsibilities and what's going on in Rex's department. Students may wish to provide examples from the case of symbols, stories, or other artifacts that symbolize the respective

cultures/subcultures in the organization. Instructors may wish to ask students about their own experience with subcultures and disconnects between the espoused values and realities in their own organizations. What messages are inadvertently sent about what's valued and devalued in organizations? There is a great deal of evidence to support the notion that supervisors in some organization still value "face time" and measure performance based on how long an employee is physically present at work (e.g., Lewis, 2001). This presents some challenges for employees seeking more flexibility and who wish to emphasize productivity versus impression management.

Discuss how generational differences in balancing work/life responsibilities may help explain Rex and Beverly's different perspectives. While we do not wish to reinforce stereotypes about age, there is some compelling research to suggest that, in general, there are some differences in the values of Baby Boomers (broadly defined as those born during 1946–1964) and Generation X (broadly defined as those born during 1965–1983) when it comes to perceptions of work–life balance (Beutell & Wittig-Berman, 2008). According to Beutell and Wittig-Berman (2008), Generation X is the generation most focused on work–life balance. It is useful to see how different perceptions among generations about work–life balance and how to achieve it may lead to misconceptions. Beutell and Wittig-Berman (2008) characterize Baby Boomers as seeing work as a central element in their lives and viewing those who wish to have more flexibility as less dedicated to the organization. Thus, Rex may see Beverly as less dedicated to the organization, while Beverly sees the schedule flexibility as indispensable in her quest to balance both work and nonwork obligations. This question has led to a discussion about values differences among the generations. Students are able to articulate that members of their generation want work–life balance and are willing to take a job with an organization for less money if that means better work–life balance. Students also talk about how they don't want to follow the lead of Baby Boomers when it comes to the stereotypical live to work ethos. Millennials want a great deal of flexibility, and the students expressed frustration that their supervisors do not seem to be willing to give them this amount of flexibility.

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