



## Case Study Briefing

Reconciliation of Work and Family in the frame  
of the “Audit Berufundfamilie” – a Case Study  
of Münster's University Hospital  
(Münster, Germany)



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## 1. Overview

**The systematic implementation of family consciousness through the Audit berufundfamilie – the case of the University Hospital Münster (UKM).**

With this case study we evaluated the innovativeness, implementation and impact of social investment in the field of family policy. The investigation describes ways of implementing social investment and helps to find a strategy to adapt effective and efficient social policy instruments for different policy fields and countries.

With the term ‘social investment’ we refer to social policy instruments which aim at enabling people to cope with future risks through e.g. education, training, social services or universal access to child care. In this view, social policy becomes a preventative long-term strategy with social and economic returns over time instead of merely compensating for income losses in certain situations.

## 2. Key policy implications

**Investments in the systematic implementation of family consciousness at the workspace leads to a better work family reconciliation for employees and in the same time supports employer branding.**

- Services for employees should provide individual solutions, universal access and personal counselling from one hand. Therefore, a one stop shop like a family office can be a successful instrument.
- Network structure is essential: in order to offer a diverse pool of measures and in the same time ensure cost containment it is important to integrate services of public and private actors as well as intermediaries, such as family networks or family service networks.
- To implement a family conscious company culture is a long-term process: Therefore, a companywide strategy must be implemented and communicated through different channels. The strategy and most measures must be created and discussed by participating all levels of staff to enhance democracy and commitment.
- The measurement of employee needs and the evaluation of existing offers with instruments like a survey is essential especially in big organisations. Politics and networks could support this through employee survey templates, manuals, counselling or funds for hiring research services.

## 3. Context

More and more organisations are facing problems in recruiting skilled workers. This is especially the case for the health sector, where a lack of specialists and care workers is evident. Some reasons are the working conditions: long working hours, tight schedules and shift work are common. Especially for women, who are the biggest group of health sector staff, these conditions plus the inflexibility of reducing working hours in higher positions are a challenge.

Therefore, the UKM strongly focusses family conscious human resource measures since 2010 by using the Audit berufundfamilie. The Audit provides a management tool in the shape of a certificate that approves a family friendly environment. Previous to the certification, the Audit process evaluates the specific circumstances of the organisation and develops measures to improve the work life balance for employees. The process is long-term oriented with steady evaluation and certification. Originally, the Audit was founded at the Hertie foundation and is recently co-financed by the ESF and the Federal Ministry for Family, Seniors, Women and Youth (BMFSFJ) in the frame of the programme “Shaping the reconciliation of family and occupation” (Vereinbarkeit von Familie und Beruf gestalten).

The InnoSI project identified the Audit as social investment, since in its frame private and public money is invested to support parent’s labour market participation from the company side with a sustainable business strategy aiming at and measuring the social and economic return. At the same time, the Audit is innovative in finding individual solutions for specific organisational circumstances and employee needs. It enhances efficiency through assessment and integrating external actors as well as effectiveness with supporting a wide array of measures and integrated services for consumers. Different kinds of organisations are auditing their services to increase work motivation, reduce vacancies and absences as well as to enrich the company brand. These initiatives can be found all over Germany in increasing amounts, since the awareness of family issues is arising in every branch.

The InnoSI project tries to answer the following questions:

**Has the auditing process been implemented as intended? If not so, why?**

**Did the initiative produce an economic and social impact? If so, how?**

**What can we learn and adapt for other policy fields and regions?**

## 4. Sources of evidence

To evaluate the implementation and impact of social investment in the case of family conscious human resource policy at the UKM, we took different sources into account.

For a **first** overview, we studied the state of the art in research literature as well as already existing evaluations of the UKM and similar institutions. Furthermore, policy documents and legal frameworks have been analysed to gain insights in public objectives and measures in family policy.

In a **second** step, we tried to describe the group of persons in need as well as the aims of the UKM with conducting interviews and using official statistics.

After having identified the needs and intentions of all groups, we designed a model describing the measures, steps and instruments to achieve these goals and needs in a **third** step.

**Fourth**, we compared the ideal model with the real implementation of the social investment to identify successful, less successful installed or delayed measures. We have measured the actual state with internal statistics of the UKM and interviews.

In a **fifth** and **sixth** step, we have evaluated the social and economic impact of the intervention by assessing a change of situation for the persons in need and the monetary return for the UKM. As a basis for the evaluation, we conducted interviews, analysed internal UKM data and compared the numbers with official statistics.

## 5. Main findings

The analysis of the case study shows that 84 measures have been stipulated by the auditing process to be implemented, adjusted or revised. To the date of the case study, 84 measures are implemented, even though some deviate from the agreement. However, a comprehensive stock of instruments has been established with even more planned after the next audit phase.

The most important innovation is the Service Office for Families (FamilienServiceBüro) as a one stop shop for employees, which provides individual services, information and counselling concerning family responsibilities. It is increasingly accepted by UKM staff. The number of counselling sessions rose from 88 in 2011 to almost 300 in 2015. With approximately 300 children of UKM employees born per year a high take up rate can be perceived. However, fathers are, with 20% of all participants in counselling sessions, underrepresented. This is also the case for the take up of parental leave. The UKM is aware of this discrepancy and will focus the participation of men in care responsibilities more thoroughly.

Since a huge measure pool is not effective until employees are able to use it, an information and communication system must be built. Thus, the UKM conceived information material through different channels: the intranet, the UKM newspaper, seminars and workshops for different professional groups and most important the central counselling at the family service office. That way, most employees can be reached, but not all of them as a representative of UKM admitted.

The most important group, which must be reached to spread information as far and effective as possible, is the lower and the middle management level. Those represent the company in everyday work life and thus have the highest impact on the company culture. The UKM targets the management levels with special information tools on the intranet, discussing the topic in different executive meetings, "family conscious leadership" handbooks and trainings like "Management for doctors". Already, many managers could be reached, but some professionals at UKM are still sceptical concerning equal career chances for caring men and working women as well as for part time workers. This has been criticised by the Audit and will be an important topic in the next assessment phase. However, the UKM is a huge organisation and cultural change happens slowly.

The scope of the intervention in family policy at UKM broadened during the auditing process. It covers more and more care responsibilities of men and care of other relatives than children. Furthermore, an inclusive strategy evolved: instead of addressing only employees with dependents, all employees are eligible to use work and family measures, since issues of reconciliation could be pressing in the future for them, too.

## 6. Impact & Implications

Gathered data on direct expenditure on the part of UKM shows large programme-related investments. Nevertheless, previous research suggests that investments in work-family reconciliation brings about a positive return from a business perspective as well as social value. Expected monetary effects for UKM-employees include a higher income and pension level and for the UKM they include lower costs for replacements and reintegration, higher productivity and lower turnover rates. The non-monetary effects expected for UKM-employees are a higher degree of satisfaction, a lower level of stress and better health. The UKM is expected to profit from non-monetary effects such as a higher level of work motivation, a higher commitment to the company and enhanced recruitment.

The case study suggests that the programme is all together implemented as intended. A huge measure pool guarantees that employees have the possibility to find answers to most of the (potential) reconciliation challenges. This is important, since the needs of families are becoming more and more versatile. At the same time the balance between family and work gets increasingly complex with a variety of services, actors and rules. Therefore, plural services and measures have to be managed and purified at a central point accessible for all employees. To conclude, from the employee perspective, the following points are central: individual solutions, universal access and personal counselling from one hand.

The underrepresentation of fathers in family care and the limited sensitisation for work family reconciliation of managers points to the most important challenge for corporate family policy: changing the company culture. Since the male breadwinner model has been strongly supported in Germany until recently, it is difficult to influence the way of thinking or behaving of key persons. The opinion persists that career options are only available with a full-time position. Therefore, a companywide strategy has to be implemented and communicated through different channels. This strategy with most measures should be created and discussed by including all levels of staff to enhance commitment.

This leads us to another important challenge: steady data collection and assessment in the frame of a tight budget and schedule. Regularly surveys of employee needs and economic return are necessary to ensure effective and efficient implementation of strategies and measures as well as satisfaction and commitment of employees.

To provide the demanded services most effective and efficient, the UKM uses the expertise and services of external actors. Networking is a key strategy to gain new ideas and information, share tasks, find service provider and exchange best practises. The company network "Success factor family" (Erfolgsfaktor Familie) in Germany is a good example for a nationwide exchange platform on family conscious human resource strategies.

## 7. Further information

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For further information on InnoSI: Innovation in Social Investment: approaches to social investment from the scientific perspective, visit our European website at <http://innosi.eu/>.

You can find the case study description also in German at <http://www.uni-muenster.de/IfPol/InnoSI/index.html>.

Authors:



**Corinna Schein, Münster University, [Corinna.Schein@ffp.de](mailto:Corinna.Schein@ffp.de)**



**Carolin Schönert, Münster University, [schoenert@uni-muenster.de](mailto:schoenert@uni-muenster.de)**

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[www.innosi.eu](http://www.innosi.eu)

