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EFFECT OF WORK-LIFE BALANCE ON THE SELF AS INSTRUMENT

A Research Project

Presented to the Faculty of

The George L. Graziadio

School of Business and Management

Pepperdine University

In Partial Fulfillment

of the Requirements for the Degree

Master of Science

in

Organization Development

---

by

Soumya Naidu

August 2011

This research project, completed by

SOUMYA NAIDU

under the guidance of the Faculty Committee and approved by its members, has been submitted to and accepted by the faculty of The George L. Graziadio School of Business and Management in partial fulfillment of the requirements for the degree of

MASTER OF SCIENCE

IN ORGANIZATION DEVELOPMENT

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Abstract

This study examined the effects of work-life balance, or lack thereof, on the use of self as instrument by consultants from a physical, cognitive, and action perspective. Organization development practitioners may not be aware of importance that the development of self has on their ability to be effective consultants, and how much of an impact the ability to maintain a balanced, well-rounded life has on the self as instrument.

A mixed method approach was used, which consisted of a survey set (made up of four separate scales) and an interview process. The survey gathered demographics and data on work and family role strain, physical stress at work, physical stress in a nonwork environment, and role influences. Fifty-three members of the master's of science in organization development listserv email group were involved in the study. Participants had to be employed full-time and have at least 5 years of work experience. Six participants were randomly selected for an interview. Content and statistical analyses were used to examine the data.

Married participants showed higher nonwork stress than their unmarried counterparts. People with a high role strain indicated uniformly higher strain and burnout in both work and nonwork environments. Two key attributes—personal relationships and time management—were found to affect work-life balance and, in turn, the self as instrument. These attributes are also affected by work-life balance.

Three limitations affected this study: a narrowly focused population, researcher bias, and survey design. Suggestions for future research include expanding this study to a larger sample and a wider group (not just organization development practitioners), utilizing multiple raters to confirm analysis of data and to avoid any self-report bias that might affect the research, and using shorter, more appropriate survey instruments.

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"If I have seen further, it is only by standing on the shoulders of giants." – Isaac Newton

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Chapter 1

Introduction

Some researchers have observed that society is in a time when career and status has superseded the importance of time spent with family and the community (McMillan, Morris, & Atchley, 2010). The recent volatile economic climate, however, is prompting people to change their views of what is important in life:

> The attainment of work/life (family) balance continues to be the mythical quality standard not only for individuals in the workforce but also for the organizations the employ them. Work/life issues impact everyone, regardless of their education level, gender, income level, family structure, occupation, race, age, job status, or religion. (p. 6)

Work-Life Balance

The word *balance* usually suggests equality of some kind. When it comes to the balance of work and life, however, the equilibrium refers to being content with both and satisfactorily managing one's roles in each aspect of the life. The importance of maintaining a healthy work and nonwork life needs to also be understood by organizations hoping to attract high-caliber employees. Research conducted by the Corporate Executive Board (2009) found that among more than 50,000 globally-employed workers, work-life balance was the second most valued attribute when looking for an employer. Second to only compensation, the work-life balance was estimated to account for 21% of an employee’s effort (Corporate Executive Board, 2009).

Self as Instrument

Mahatma Gandhi once said, "You must be the change you wish to see in the world" ("Mahatma Gandhi Quotes," 2011, para. 1). Organization development (OD), surprisingly, has a large component of helping. Categorized as a service-role, OD practitioners devote considerable time in helping the client (whether an individual, group, or large system) determine its hidden culture, reveal unrecognized assets and talents, and build sustainable capabilities that will help in long-term change. Following Gandhi's principle, OD practitioners must then, themselves, be the instrument of change before impacting external organizations. Tuning the inner instrument can start by

> devoting time and energy to learning about who we are, and how issues of family history, gender, race and sexuality affect self-perception . . . [and] identifying and exploring the values by which we live our lives, as well as developing our intellectual, emotional, physical and spiritual capacities. (Cheung-Judge, 2001, p. 12)

Research Purpose

Economic conditions are taking a toll on people's lives. Jobs are demanding more time away from people's families. OD practitioners work on tuning their instruments (self) so that they become better consultants to others. Tuning a guitar, for instance, requires that all the chords be addressed for the instrument to play harmoniously. Similarly, one's work and life need to be well balanced in order to gain a well-rounded experience and, therefore, be better OD practitioners.

The purpose of this study was to determine the ways one's work-life balance (or lack thereof) affects the self as instrument (SAI). The Practical Self as Instrument Model developed by Jamieson, Auron, and Shechtman (2010)

conceptualizes SAI in three stages: See, Know, and Do. These are used as the foundation of SAI in this study. *Seeing* entails consuming data by being aware of one's environment, interactions with others, behaviors, and triggers. *Knowing* is the process of taking the data absorbed (Seen) and, using one's knowledge and experiences, drawing logical conclusions or interpretations. *Doing* is the capability of executing the results of the previous two competencies. The following research tested the effect on the Do portion of using SAI by addressing the linkage of work-life balance with that of Seeing and Knowing.

SAI can be mistaken for self-mastery; however, these are two slightly different paths of self development. Self-mastery refers to the ability to control one's emotions, impulses, and actions in all situations, with the intent to consciously and steadily move toward one's goals (Mind Tools, 2011). Mastery can be helpful in enhancing one's consciousness of self (similar to SAI). However, SAI concentrates more on the alignment of who one is—including one's strengths and weaknesses for a thorough awareness (versus simply controlling one's weak points). Jamieson et al. (2010) also discusses mastery as a stage of self-development (see chapter 2) where, along with observing, processing, and acting upon the inputs, the self-instrument is characterized by fully integrating these horizontal facets into seamless work.

The research questions examined in this study were:

1. How does one's work life affect one's nonwork life, and vice-versa?

2. How is the physical self (See) affected by work-life balance or imbalance?

3. How is the cognitive self (Know) affected by work-life balance or imbalance?

4. How is the action of the self (Do) affected by physical and cognitive strain?

5. What is ideal for self-care?

Importance of the Research

It will be beneficial to know the impact of too much work on the being for recent OD graduates, as well as those who have established themselves in the OD field,. If the practitioner's credibility lies in using SAI in one's work, it is imperative to know what aspects of one's life and work may be out-of-tune. Antithetically, an attuned self, defined as "allow[ing] for the enactment of appropriate behavior," will be the culmination of successful execution of the Seeing and Knowing of SAI, as is further explored in chapter 2 (Jamieson et al., 2010, p. 7).

Research Setting

The master's of science in organization development (MSOD) listserv email group was used as the study population. The concept of SAI is understood and perhaps exercised as part of the daily life within this community. In addition, only those who were employed full-time at the time of the study and had at least 5 years of work experience were invited to complete a survey. This process was followed to ensure that a more established work-nonwork environment was present. Of those surveyed, six participants were randomly chosen and invited to participate in an interview that further explored the concepts of work-life balance and SAI.

Study Outline

The purpose of this introduction was to demonstrate the need for exploring the effect of work-life balance on SAI, to review the purpose of this study, and to describe the value it provides. Chapter 2 reviews existing research and relevant literature on OD practitioners, work-life balance, SAI, and the effects of the three on each other. Chapter 3 outlines the study's purpose and relevance of the research methods as well as the research and design specifics, such as sampling methodology, variable definitions, survey method, interview protocol, and data analysis procedures.

In the final two chapters, the research is completed and the implications on practitioners and researchers are explored. Chapter 4 reports the quantitative and qualitative results. In chapter 5, the conclusions of the study are presented, restating the original purpose and reviewing the key findings and the assumed meanings of these findings. Recommendations, study limitations, and implications for further research are also discussed in chapter 5.

Chapter 2

Literature Review

The purpose of this study was to determine the effect of work-life balance, or lack thereof, on SAI among consultants from a physical, cognitive, and action perspective. This chapter provides a review of relevant literature.

The OD consulting profession is discussed first followed by consideration of OD professionals. This literature is provided as context and foundation for the study. The next section reviews literature on SAI, including its definition and components, use of self frameworks, work outcomes of SAI, and the particular influence on SAI for OD professionals.

The final section discusses work-life balance, including its definition, influences, and outcomes. Studies of work-life balance among OD professionals and work-life balance in relation to SAI were also examined.

OD

The OD Network gives quite a clear explanation of what OD is, its process, and how it differs from traditional consulting. Simply put, OD is the process of improving organizations. OD focuses on benefiting the client—as a whole—whether the client is an entire company, group, or an individual. There is an element of co-creating, differing from traditional consulting, where both the client and the consultant work together to determine a suitable course of action. (ODN Chicago, n.d.). The objectives of the relationship are met by assessing the issue(s), gathering data, brainstorming opportunities of change, implementing the decisions, and collecting feedback for continuous improvement (Block, 1981).

The history of OD can be summarized into the five phases or stems: (a) sensitivity training or T-groups developed with the growth of the National Training Laboratories, which focused on deepening awareness of self and others among intact workgroups; (b) action research, which focused on studying the management of change, including survey feedback; (c) standards creation for designing and operating organizations; (d) productivity focus and consideration of its impacts on quality of work life; and (e) strategic change and organization transformation (Cummings & Worley, 2010).

With dramatic changes in the needs for and nature of OD, it is important to consider several definitions of OD for a better understanding of the field. “Organization development is an effort planned, organization-wide, and managed from the top, to increase organization effectiveness and health through planned interventions in the organization's 'processes,' using behavioral-science knowledge” (Beckhard, 1969, p. 9) Cummings and Worley’s (2010) definition of OD aligns with that of Beckhard’s, with the exception that the latter limits OD intervention to a top-down approach while the former allows for changes to happen as deemed necessary for the organization and situation. Importantly, these changes may be top-down, bottom-up, or even across the organization.

Neilson (1984), on the other hand, takes a slightly different approach when defining OD. He takes personal influence and responsibility into consideration and makes a claim for the importance of individual contribution to an organization’s effectiveness:

> Organization development is the attempt to influence the members of an organization to expand their candidness with each other about their views of the organization and their experience in it, and

> to take greater responsibility for their own actions as organization members. The assumption behind OD is that when people pursue both of these objectives simultaneously, they are likely to discover new ways of working together that they experience as more effective for achieving their own and their shared (organizational) goals. And that when this does not happen, such activity helps them to understand why and to make meaningful choices about what to do in light of this understanding. (p. 2)

In short, OD is the process of improving organizations—be it the employees or the stakeholders. OD strives to assess the organization as a whole to gain understanding of current situation and identifying opportunities for change that will not only align with the business' objectives, but hopefully, also will prepare the system for future changes.

OD Professionals

Working to improve the effectiveness of organizations and their resources, OD practitioners are professionals who establish relationships with key personnel, evaluate and diagnose the organization's goals and subsequent dysfunctions, identify appropriate interventions and develop planned change processes, and evaluate the ongoing change approaches and outcomes (Church, Burke, & Van Eynde, 1994; McDermott, 1984).

The OD Network called practitioners *change agents* and explained that they "come from varied backgrounds with experience and training in OD, organization behavior, psychology, education, management and/or human resources. Many have advanced degrees and most have experience in a variety of organizational settings" (ODN Chicago, n.d., para. 13). Activities that OD consultants facilitate include, but are not limited to, teambuilding, goal setting, group facilitation, creative problem solving, strategic planning, leadership

development, management development, career management, conflict resolution, developmental education, interpersonal communication, human resources management, managing workforce diversity, organization restructuring, high involvement work teams, sociotechnical systems design, technical training, and total quality management.

External versus Internal Practitioners

OD practitioners may be external or internal. External practitioners are consultants who have been called in to assess a situation and who are not employed by or legally affiliated with the client organization or system. They also often have the authority to initiate change in work groups (Brown & Harvey, 2006). They may be self-employed or an employee of a consulting firm. Brown and Harvey identified the advantages and disadvantages of external practitioners. He states that external consultants are of a great advantage to the company in that that this practitioner brings in differing viewpoints and objectivity due to their lack of dependency on the organization. On the flip side, there are disadvantages to being an external consultant, such as unfamiliarity with the client organization, its culture, communication networks, and power systems. Internal practitioners work within an organization and serve internal business clients.

Brown and Harvey (2006) further explained that an internal consultant, unlike an external consultant, is a member of the client organization—most being a part of the human resources or OD departments. While an employee of the organization—ranging from a top executive to a front-line associate—can be called upon as an internal consultant, these practitioners generally have titles

such as *executive, manager, lead*, or *consultant*. These titles vary within the system. An internal practitioner's faces advantages such as having familiarity with the client organization's culture, norms, interests, and power structure. However, the disadvantages may be that he or she lacks specialized skills or objectivity. He or she also may face pressure from the client organization to conform to a particular outcome or problem-solving methodology. There also is a possibility that an internal consultant may not have the necessary power or authority to implement difficult (albeit necessary) changes.

There are an "increasing number of managers and administrators who have gained competence in OD and who apply it to their own work areas" (Cummings & Worley, 2010, p. 47). So, in short, anyone can be an OD practitioner by understanding the concepts and applying it both to their inner selves and their outer environments—be it interpersonal relationships, community service, or organization changes.

Core Competencies

Egan and Lahl (2005) created the Whole Person Dimension (SPINE) Model to depict the spiritual, physical, intellectual, intuitive, and emotional aspects of being an OD practitioner. *Spiritual* refers to being centered on meaning, one's worldview, and moral courage. *Physical* addresses the body as a signaling system that helps practitioners manage their energy and enhance their wellness. *Intellect* means being comfortable with both complexity and ambiguity using critical and systematic thinking. *Intuition* refers to the discernment and interpretation of non-rational information, which can help in recognizing unrelated and unexpected patterns. Finally, *Emotion* refers to one's comfort with the

breadth and depth of their feelings. The recognition of feelings can be a great source of information.

Cummings and Worley (2010) identified six key skill areas that are critical to an OD practitioner's success: leadership, project management, communication, problem-solving, interpersonal, and personal. Such cognitive demands warrant a disciplined principle in handling consulting projects. The discipline is not only limited to the self, but to the client-consultant interaction as well. "Develop effective habits for establishing and maintaining appropriate boundaries with colleagues and clients" (Cheung-Judge, 2001, p. 14).

OD consulting can be compared to that of a service profession. While it reaps the satisfaction of helping individuals, groups, and organizations develop, it also faces the threats of high levels of stress and the possibility of career burnout (Cummings & Worley, 2010, p. 46).

A practitioner (whether internal or external), can bring many things to the client organization including knowledge, skills, values, and experience. However, this value is contingent upon how much of one's cognitive self the consultant is willing to share with the client. There is a level of emotional connectedness that allows for this flow of information. In a research conducted to test the role of personality in the interaction between a consultant and a client, Adiyanto (2011) claimed that "With regard to high openness . . . , this research found that consultants who are higher on openness tend to derive a more successful consultancy" (p. 47).

High emotional demands mark the work of an OD professional (Brown & Harvey, 2006). With a stress factor of this kind that affects a professional's

effectiveness as an OD practitioner, as well as in other aspects of life, research supports the importance of appreciating, studying, and understanding emotions. With this, one can delve into the world of emotional intelligence—“the ability to recognize and express emotions appropriately, to use emotions in thought and decisions, and to regulate emotion in oneself and in others” (Cummings & Worley, 2010, p. 55).

Emotional intelligence supplements rational thought, knowledge, and skill, allowing the practitioner to build one’s intuitive competence, which is the characteristic that helps in directing attention to important information not addressed in models and theories. “In that sense, some researchers argue that emotional intelligence is as important as cognitive intelligence. Reports from OD practitioners support the importance of emotional intelligence in practice” (Cummings & Worley, 2010, p. 58).

Worley, Rothwell, and Sullivan (2005) created a list of core competencies they believe are needed for one to be a successful OD practitioner (See Appendix A). Included in the comprehensive collection of core competencies is self-awareness, an important and much-needed prerequisite for being an OD consultant. It is important to have a good understanding of the self, how one manages feedback and conflict, how one makes decisions and solves problems, and how one views organizations.Brown and Harvey (2006) added the following competencies to the list of needed skills among OD practitioners: team development, corporate change, strategy development, management development, employee development, technology integration.

SAI

The topic of SAI has been conceptualized, professed, and talked and written about throughout the existence of the OD field. However, interpretations of the concept range widely, from “simply knowing more about your ‘self’ to deeper recognitions of consciousness, choice, shadows, agency, behavior patterns, developmental theories, and intentionality” (Jamieson et al., 2010, p. 4). Jamieson et al. (2010) explained that ideas about the “use of self has often been ambiguous, vague, and difficult to convert into action” (p. 4); therefore, it is important to understand the range of understanding of SAI when conducting research around this subject.

Jamieson et al.’s (2010) Managing Use of Self Framework, articulates SAI in horizontal and vertical dimensions. The vertical dimension represents levels of development including functionality, efficacy, and mastery. The horizontal dimension (and the focus of the present study) highlights three core competencies: Seeing, Knowing, and Doing.

Seeing “is the competency of being aware of the world around us and the ability to take in as much data as possible” (Jamieson et al., 2010, p. 6). To develop this competency, it is important to expand one’s breadth of openness and depth of inquiry, as well as enlarge one’s scope of awareness. On a meta-level, for one to become cognizant of personal filters and blocks, it is important to expand and enhance various roles and increase interactions with people from all aspects of one’s life. Knowing “is using a combination of knowledge and experience to organize information and draw hunches, conclusions, and interpretations. This process includes multiple ways of knowing (e.g., empirically,

rationally, somatically, and socially constructed)" (p. 6). Doing is the capability of executing the results of the previous two competencies. "It is the culmination of the data intake and interpretation process that allows for the enactment of appropriate behavior" (p. 6).

Cheung-Judge (2001) offers that knowledge and behavior, along with the effective integration of interpersonal skills, attributes, and technical knowledge, encompasses SAI. "This notion of instrumentality is akin to the emphasis of heightened self-awareness in a gestalt approach to organization consulting interventions" (p. 12).

Jamieson et al. (2) also expanded on the attributes within Egan and Lahl's (2005) SPINE model, explaining that the spiritual dimension involves deeper meaning, higher powers, natural connections; the physical dimension involves somatic sensations and body-mind connections; the intellectual and Intuitive dimension involves theory, models, concepts, and tacit knowledge; and the emotional dimension involves emotional intelligence, feelings, relations, and other competencies.

Managing Use of Self Framework

Every individual uses SAI, whether that use is conscious or otherwise. Being aware of the inner instrument, or as Cheung-Judge (2001) puts it "owning and refining our instrumentality" (p. 12), would give one the opportunity to develop, hone, and control the sets of characteristics that affect not just the person himself or herself, but also others around the individual.

The Johari Window, developed by Joseph Luft and Harry Ingham (1955), is another tool that helps navigate through what is known, unknown, hidden, and

open about one's self. "Without whole self-awareness, we only enter situations with knowledge of part of who we are and may not have the consciousness and choice to manage or leverage how we use our self for the welfare of the situation" (Jamieson et al., 2010, p. 8). Therefore, people need to expand their life experiences so more of their Johari Windows are visible to themselves. Jamieson et al. added, "learning more about ourselves is not a solo endeavor," (2010, p. 8); therefore, interaction with others in work and personal settings is needed to know oneself thoroughly. Hence, time and space needs to be created for work and nonwork experience.

Regardless of the work one does or the role one plays in life, "Our use of self engages cognitive, emotional, physical, and spiritual aspects at different moments and in different situations" (Jamieson et al., 2010, p. 7). Egan and Lahl (2005) as well as Jamieson et al. (2010) all allude to how self-knowledge helps illuminate the above-mentioned aspects of the self on a deeper level. Self-knowledge helps isolate one's feelings, triggers when interacting with others, emotional strengths, personal limitations, personal values, personality traits, personal meaning, preferences, sensitivities, and vulnerabilities.

Work Outcomes

Developing the SAI competency has the potential to "enlarge one's scope of awareness, be able to recognize multiple types of data, become cognizant of personal filters and blocks, and identify ones' own individual and cultural biases" (Jamieson et al., 2010, p. 6). At a time when competition at work is fierce, this ability to discern the bombardment of data into digestible information and the capability to foresee how one would react in a given situation can be invaluable,

both, to succeed at work and to maintain a healthy nonwork life. Similar to that of a guitar, piano, or any other musical instrument, the usefulness of self can be advanced and its functionality enhanced over time and by careful maintenance. (Jamieson et al., 2010, p. 9).

Influences on the Role and Impact of OD professionals

Consulting, especially when it utilizes the methodologies of OD, is imbedded in being of service to others. As mentioned earlier, clients can range from individuals to large corporations. As such, “consulting necessitates a high degree of self-knowledge and personal development” (Cheung-Judge, 2001, p. 11). Jamieson et al. (2010) add,

> Our professional roles, including our ability to add value and do no harm, are helped or hindered by the instrumentality of our strengths and limitations, presence and movements, awareness and blind spots, cognitive and emotional intelligence, and fears and courage. (p. 9)

Both Jamieson et.al. (2010) and Cheung-Judge (2001) state that the amount of time and energy spent on knowing one’s self better can differentiate a highly skilled, well-respected, and effective OD consultant from a highly skilled but ineffective OD consultant. One’s ability to absorb information, understand the situation, and act effectively can vary on how well one tunes his or her instrument over time, meaning the effort one puts into bettering oneself.

Consultants, who are considered to be in a helping profession, have a better chance of being of service to their client when they have a greater awareness of self. In the inverse, the lack of self-awareness may cause potential harm, both to the client and the consultant. While “our personalities, such as, attitudes, values, motivations, biases, fears, assumptions, anxieties, feelings,

habits, self-esteem, and hidden selves" are a make-up of our inner self, the inverse—an effect of cognitive maturity, by way of vast experience—is the level of intelligence, knowledge, and skill that we bring to each situation. It is also imperative to keep in mind that one is evolving on a continuous basis, influenced by the environment, social and societal disciplines, and interactions with others (Jamieson et al., 2010). So, it is important to allow exposure to the various dimensions that enrich one's experiences. This leads to the next topic: work-life balance.

Work-Life Balance

Work-life balance has been extensively studied and surveyed (Cheung-Jung, 2001; Jamieson et al., 2010; Worley et al., 2005) and it is relevant to all people who work, "regardless of their education level, gender, income level, family structure, occupation, race, age, job status, or religion" (McMillan et al., 2010, p. 6). Other sources have called it *work-life conflict* (Fields, 2002; Bonebright, Clay, & Ankenmann, 2000); however, because conflict generates a rather negative tone, this discussion refers to the subject as *work-life balance*.

Work-life balance can generally be defined as "hold[ing] a balanced orientation to multiple roles" (Greenhaus, 2003, p. 512). However, McMillan et al. (2010) point out, "the attainment of work/life (family) balance continues to be the mythical quality standard not only for individuals in the workforce but also for the organizations that employ them" (p. 6). The mystery of the difficulty in establishing a healthy balance despite the understanding of the concept is what intrigues many researchers to study this subject. McMillan et al. counter, therefore, that work-life balance "provides a broad enough definition to include

both positive and negative balance" (p. 13). They define the term as "the extent to which an individual is equally engaged in—and equally satisfied with—his or her work and family role" (as cited in Greenhaus, 2003, p. 513).

Work, itself, has changed over the course of the years. Montgomery (1980) highlights the changes in the American and European workforce, from industrial work to the technological deployment, and the demand for greater control over their jobs. An unexpected finding from Andersson, Svensson, and Oden's (1983) study was that low-back pain in the middle-aged workers was affected by 10 variables—diminished work satisfaction and decreased potential to influence one's work situation being two of them. In recent years "Generation Y employees are seeking greater work-life balance . . . to be able to spend enough time with their families, which is also the number-one rated work/life priority of more than 80% of men and women," according to 2006 Society for Human Resource Management Knowledge Center (as cited in McMillan et al., 2010, p. 7). According to the 2007 Job Satisfaction Survey Report by the Society for Human Resource Management, the flexibility to balance life and work issues was given a rank of very important by a majority of the respondents (McMillan et al., 2010).

Influences on Work-Life Balance

Commitments and demands from both work and personal lives have become commonplace for men and women. With higher career ambitions and the struggle to have it all, it seems that individuals overlook the fact that the whole self goes into each of the roles and situations in one's life. This balance becomes of greater importance today as "managing the demands of competing

life roles has become a common experience for many American men and women" (Amatea, Cross, Clark, & Bobby, 1986; Jamieson et al., 2010).

Key source of stress in role expectations are the "internalized beliefs and attitudes about (a) the personal relevance of a role, (b) the standards for performance of the role, and (c) the manner in which personal resources (i.e., time, money, and energy) are to be committed to performance of the role" (Amatea et al., 1986)

McMillan et al. (2010) address the causal relationship of time-based conflict and scarcity theory. Time-based conflict addresses that the amount and preoccupation with one role negatively affects the amount of time available as well as the ability to function in another role. Scarcity theory inversely relates to time-based conflict in that it is the notion that "the total amount of time and/or energy available to an individual is fixed and participation in multiple roles decreases the total amount of time and/or energy available to meet all demands, thereby creating conflict and strain on the individual" (p. 9). Both philosophies can be used to support the harmful effect of a role strain on the balance of work and life.

> Balance occurs when an individual experiences low levels of interrole conflict in combination with high levels of interrole enrichment. . . . Marks and MacDermid's (1996) role-balance theory that contends it is possible to be fully engaged in both roles without sacrificing one for the other. (McMillan et al., 2010, p. 13)

Outcomes

Work-life balance can have clear organizational impacts. From an organization's perspective, focusing resources and change initiatives on employees' work-life balance translates into a cohesive and supportive bond

between the needs of both organization and employee, as well as a worker's work-life balance (Marques, 2006) McMillan et al. (2010) add,

> [Focusing] individual and organizational learning and change that supports . . . employees' need for work-life balance . . . can ultimately contribute to the organization's competitive advantage and overall performance. This level of integration translates into enhanced attunement between workers' and organizations' needs and workers' work-life balance. (, p. 7)

Stress erodes workers' abilities to successfully balance their work and personal life and perform well on the job (McMillan et al., 2010). Mickel and Dallimore (2009) add,

> Research suggests that one-third of all United States employees are chronically overworked. Even in the European Union where 80 percent of the EU population reported having work-life balance, 19 EU countries reported that over 40 percent of their employees suffer negative work-related outcomes such as health problems caused by their work. (p. 628)

Work-life balance also has an impact on the individual. "Strain-based conflict is based in the idea of fatigue and irritability created from one role affecting the activities in the other role" (McMillan et al., 2010, p. 9). A lack of work-life balance can lead to physical strain—"mild depression, loss of temper with clients and staff, lack of motivation, and continuous fatigue to physical illness, loss of focus, and serious depression" (Cheung-Judge, 2001, p. 16).

> Strain-based conflict also reflects person–environment (P-E) fit theory, developed by Kahn et al. (1964). P-E fit is based on conflicting role demands, where fit is defined as the match between an individual's knowledge, skills, and abilities (KSAs) and the role he or she is asked to perform. When KSAs do not match the expectations of the role (whether work or personal), a lack of fit develops, ultimately leading to stress (both positive and negative. (McMillan et al., 2010, p. 9)

Work-Life Balance among OD Professionals

It is often said that necessity if the mother of invention. Cheung-Judge (2001), however, contends that it is important to “build a knowledge base in the field even when this seems neither urgent nor critical” (p. 14). Knowledge base can be extended to experience on how to deal with interpersonal conflicts. This means human interaction, which could be gained from having more nonwork, family, and social experiences. This in turn makes a strong case for having balance in life.

Cheung-Judge (2001) suggests that a lack of self-care and balance in life can cause an otherwise competent consultant to slide down the continuum of effectiveness. She states that this “group often performs very well for a time, and then suddenly seems to suffer from very serious burn out” (p. 16).

> Action taking can also become challenged by falling into habitual patterns, becoming stuck in comfort areas, or choosing options that are self-serving. The client’s needs, the situation requirements, and the welfare of the system are the higher purposes in helping roles. Expanding one’s behavioral repertoire helps to provide more options and greater confidence to act. (Jamieson et al., 2010, p. 9)

People’s behaviors are different when they are at work, with family, with friends, or in any other social situation. Limiting one’s exposure to just one environment would greatly limit one’s awareness of the span of one’s behavior patterns and, therefore, limit one’s ability to accurately assess a situation.

Impact on SAI

Merriam-Webster defines *work* as a “sustained physical or mental effort to overcome obstacles and achieve an objective or result (“Work,” 2003, para. 1).

McMillan et al. (2010) adds that the interaction of work and life is dynamic and includes cognition, emotion, and social and behavioral dimensions.

> By identifying, accepting, and re-integrating parts of who we are, we bring awareness and voice to these various selves, which allows us to not only understand them, but also to choose more fully when they arise and how we want to use them. (Jamieson et al., 2010, p. 8)

Thus, who one is represents the culmination of all that person does, including both work and nonwork roles.

Each of these outcomes can be supported by the fact that one needs to be exposed to both work and nonwork aspects of life, such as personal time, family moments, outing with friends, and other social interactions in order to gain a vast experience and awareness by collecting and reflecting on various data. Imbalance between work and family time, therefore, has a pronounced effect on SAI. One's whole being cannot be understood through only one role. Therefore, it is important to have a good work-life balance through various roles to gain a wide range of experiences and, in turn, understand and practice the use of the whole self.

Cheung-Judge (2001) suggests that in order to "build emotional and intuitive self-awareness" one must "integrate [one's] personal and family" (p. 14). By putting first things first, one would need a varied experience such as work and nonwork exposure to effectively determine what things are more important.

Jamieson et al. (2010) further support the claim that work-life balance has a pronounced effect of SAI by stating that "Knowing involves making sense of what practitioners see" (p. 6), such as cultural anomalies or misalignment of vision and on-the-floor practices in the company (for an internal OD consultant)

or a client's behavioral patterns that do not support what he or she wants (for a personal coach).

Life experience helps in the development of both internal and external models that practitioners can employ to "improve their ability to gain insight, leverage the right data, and use proper discretion" (Jamieson et al., 2010, p. 6). "Through self-awareness, we gain greater consciousness, leading to greater intentionality and choice, and grow out of the confines of limited frames, biases, skills, and habits" (p. 8). Through self-awareness, the confines of skills and habits can be eradicated. This can be extended to habits of focusing too much on work or on nonwork activities. By tuning one's inner instrument, the importance of work, family, and friends becomes more apparent.

"Thus, the development of self is a holistic practice where the human being and the work roles improve together" (Jamieson et al., 2010, p. 8). Togetherness indicates simultaneity. For humans to grow holistically, the work self and the home self must both be present and sustain each other.

Summary

"Use of self is the conscious use of one's whole being in the intentional execution of one's role for effectiveness in whatever the current situation is presenting" (Jamieson et al., 2010, p. 5). Keeping this whole self in mind, this chapter explored the impacts to and from balancing one's life roles, both at work and in their personal life. The next chapter describes the methods used in this study.

Chapter 3

Methods

The purpose of this study was to determine the effect of work-life balance, or lack thereof, on SAI among consultants from a physical, cognitive, and action perspective. The research questions were:

1. How does one's work life affect one's nonwork life, and vice-versa?
2. How is the physical self (See) affected by work-life balance or imbalance?
3. How is the cognitive self (Know) affected by work-life balance or imbalance?
4. How is the action of the self (Do) affected by physical and cognitive strain?
5. What is ideal for self-care?

This chapter describes the research design, sample selection, data collection, protection of human subjects, instrumentation development, and data analysis procedures.

Research Design

Quantitative and qualitative data collection and analysis methods were used in this study. An online survey was conducted participants. Participation in this survey was voluntary and anonymous—names were not collected with the surveys. Participants were selected randomly and six one-on-one interviews were completed to gather further detail into the work-life balance and SAI. Surveys and interviews were analyzed to examine if there is a relationship between an imbalance in life (both work and nonwork) and the condition of SAI.

Sample Selection

There were two samples used for this study—one for the online survey and another for the interviews. Both of these samples consisted of alumni, current students, and anyone affiliated with the Pepperdine University's MSOD program and who subscribed to the listserv. Participants were those who, at the time of the study, at least 5 years of work experience and were employed full-time. The MSOD listserv email group was used because the concept of SAI is understood and perhaps exercised as part of the daily life among these individuals.

All members (nearly 400) of the MSOD listserv email group were invited to participate in the online survey (Appendix B). The researcher could not identify those who were employed full-time and had at with at least 5 years of work experience; therefore, these criteria were outlined in the informed consent form (Appendix C) that was electronically signed by the participant prior to taking the survey.

One of the survey questions requested the participant's email address if he or she was interested in being interviewed to further contribute to the study. The researcher randomly selected six individuals who agreed to an interview. Selected participants were emailed an invitation to participate in an interview (Appendix D) and a consent form (Appendix E) was attached to the email. The participant was given the option to not proceed with the interview at any point before or during the interview, at which time the interview would have been cancelled, without risk or penalty. If any of the randomly selected individuals

decline the invitation to interview, additional participants were randomly selected and invited to interview until there were six completed interviews.

Participant demographics for marital status and family size were fairly evenly divided. A good representation of the number of years of work experience was also present, along with an even spread of participants who spent hours on self-care—less than 2 hours, 2-5 hours, 5-7 hours, 7-10 hours, or greater than 10 hours. For the hours spent on nonwork tasks, as expected, a higher percentage of respondents showed that they spent less than 20 hours (see Table 5).

Table 5

Participant Demographics

Personal Background			Professional Background			Time Management (Hours per Week)		
	N	%	Work Experience	*N*	%		*N*	%
Gender						Work		
Male	41	77%	Less than 10 years	9	17%	20-30 hours	4	7.5
Female	11	21%	10-15 years	3	6%	30-40 hours	12	22.6
No answer	1	2%	15-20 years	8	15%	40-50 hours	25	47.2
Age			20-25 years	7	13%	50-60 hours	9	17.0
21-28	1	1.9	25-30 years	8	15%	More than 60 hours	3	5.7
29-34	7	13.2	30-35 years	7	13%			
35-40	10	18.9	35-40 years	4	8%	Nonwork		
41-46	5	9.4	40-45 years	7	13%	Less than 20 hours	35	66%
47-52	11	20.8	Employment			20-30 hours	15	28%
53-58	9	17.0	Self-employed	20	39%	30-40 hours	0	0%
59-64	6	11.3	Employed by an organization	32	62%	40-50 hours	3	6%
65 & over	4	7.5	No answer	1	2%	Self-Care		
Marital Status						Less than 2 hours	7	13%
Married	31	59%				2-5 hours	17	32%
Not married	21	40%				5-7 hours	13	25%
No answer	1	2%				7-10 hours	9	17%
Children						More than 10 hours	7	13%
Yes	29	55%						
No	24	45%						

N = 53

Due to a higher female demographic for the survey population, the random sampling of participants for interviews resulted in an all-female group.

Age groups between 35 and 58 were represented with a relatively even split for marital status and a 1:2 ratio spread of participants with kids to participants without kids, respectively. Interview questions regarding the impacts of work on nonwork and vice-versa were answered by participants from the higher response sets of the two survey demographic categories of hours spent at work and hours spent at nonwork tasks.

Data Collection

Data were collected through an online survey questionnaire and in one-on-one interviews. The survey was conducted through Survey Monkey and was emailed to potential participants (N = 400). This email described the purpose of the study, invited individuals to participate, and included the link to this confidential and anonymous online survey. The survey was open for a 2-week period and reminder emails were sent to the entire sample group 1-week prior to and again 2 days before the close of the survey. After the 2-week period, 53 online surveys had been completed.

An Excel sheet was created containing email addresses of participants who had agreed to be interviewed. Each day, the researcher updated the list with any new volunteers. When complete the researcher randomly selected six email addresses and sent an invitation to be interviewed (see Appendix D), along with a consent form (see Appendix E) to be completed and returned before the interview. Once an invite was sent, the email address was marked as such and no further correspondence was sent until a response was received. This process was repeated until six interviews were completed.

The researcher conducted the interviews by telephone or in person. The in-person interviews took place in a location that was conveniently situated in terms of distance and setting for both the interviewee and the interviewer. The in-person and telephone interviews lasted 20 to 40 minutes in duration, depending on the participant's responses. Data were recorded to facilitate accuracy in data collection. Interviewees were not individually identifiable on the recordings. The recorded interviews were transcribed by the researcher. An outside transcription service, though put in as an option in the Institutional Review Board form, was not used.

Protection of Human Subjects

Institutional approval to conduct the proposed research study was obtained through Pepperdine University's Institutional Review Board on February 4, 2010. In addition, the researcher completed the Protecting Human Subject Research Participants course sponsored by the National Institute of Health on October 5, 2009 (see Appendix F).

Participants had the option to choose whether or not to participate and had the right to discontinue the survey or interview at any time without risk or penalty. All recordings, notes, survey information, test data, test results, and data analysis from the surveys and interviews were housed in a password-protected computer and in files and storage containers not readily available to the public, to which only the researcher has access. Only aggregate data were reported in the thesis or in any subsequent analysis beyond the thesis and possible future publication of the results. All information will be kept for 3 years after the

completion of the study, after which time it will be purged. An abstract of the study results will be provided to participants upon request.

The first page of the online survey contained the consent form that described the study, the terms of participation, and participant rights. In lieu of a signed consent form, survey participants had the opportunity to click on a box to provide their consent and acknowledgment of conditions before continuing with the survey. Participants were not able to access the survey unless they click the consent box. The participant had the option to contact the researcher to receive documentation of participation in the research or to sign a hard copy of the Informed Consent form.

Selected participants were emailed an invitation to participate in an interview and a consent form was attached to the email. The interview was scheduled and the participant was asked to physically sign and give consent prior to the start of the interview in person, electronically by fax or email, or by United States Mail. Interviewees were not individually identifiable on the recordings. No transcription service was used as the researcher transcribed all the information manually and maintained confidentiality of the participants. Only aggregate data were reported by the researcher. Participation in the interview was kept confidential and voluntary at all times.

Instrumentation Development

Survey

The online survey was designed in six sections (see Table 1): demographic data, work-nonwork role strain, measure of physical stress at work, measure of physical stress in a nonwork environment, roles, and feedback.

Permission was granted by the authors and Copyright holders to use all the validated surveys that were used in this study.

Table 1

Survey Sources

Sections		Questions		Sources
1.	Demographic data	1-4	Basic demographics	Researcher selected
		5-9	Work and nonwork hours	
		10	Interview participation	
2.	Work-nonwork role strain	1	Job-family role strain scale (19 attributes)	Bohen and Viveros-Long (1981)
3.	Measure of physical stress at work	1	Work-related depression, anxiety, and irritability (21 attributes)	Caplan, Cobb, French, Van Harrison, and Pinneau (1980)
		2	Burnout measure (13 attributes)	Pines and Aronson (1988)
4.	Measure of physical stress in a nonwork environment	1	Work-related depression, anxiety, and irritability (21 attributes)	Caplan et al. (1980)
		2	Burnout measure (13 attributes)	Pines and Aronson (1988)
5.	Roles	1	Inter-role conflict survey (9 attributes)	Tompson and Werner (1997)
6.	Feedback	1	Feedback on work-life balance and self as instrument	Researcher selected
		2	Feedback on survey	

Section 1, Demographic Data, has 10 questions and was intended to collect the following information: gender; age; marital status; children; years of professional experience; currently employed in an organization or self-employed; hours spent per week at work, on nonwork activities, and on self; and finally, the participant's email address if he or she was interested in being interviewed to further contribute to the study.

Section 2, Work-NonWork Role Strain, uses the validated survey Job-Family Role Strain (Bohen & Viveros-Long, 1981) to test the strain on people when their work and family roles intersect or overlap. "The measure assesses

multiple aspects of role strain including ambiguity about norms, lack of congruity between personality and social, roles, insufficiency of resources of role fulfillment, low rewards for role, conformity, conflict between norms, and role overload" (Fields, 2002, p. 204). The 19 attributes are measured on a five-point Likert scale ranging from always to never.

Section 3, Physical Stress at Work, combines two validated surveys: Caplan et al.'s (1980) measure of work-related depression, anxiety, and irritability (DAI) and Pines and Aronson's (1988) Burnout Measure. The DAI uses a seven-point Likert scale and assesses the extent to which employees felt depressed (unhappy, sad, blue), anxious (nervous, jittery), and irritated (annoyed, angry) while working in their job (Fields, 2002). To ensure valid and usable responses from participants, three attributes were worded in the inverse and reverse-coded. Burnout was measured because "work-related strain has also been related to stressful events at work or job burnout that result in fatigue or depression in the family role" (McMillan et al., 2010, p. 9). The survey uses a four-point scale ranging from "Most of the time" to "Never or Little of the time" to ask respondents how frequently they experience 21 stress-related occurrences (Fields, 2002).

Section 4, Measure of Physical Stress in a Nonwork Environment, duplicates the questions from Section 3 to measure the strain on the physical self in a nonwork environment, such as, at home, with friends, while volunteering, etc.

Section 5, Roles, recreated the Inter-Role Conflict Survey by Tompson and Werner (1997) to test the extent to which different roles (both at work and in nonwork settings) are in conflict or are supportive. Graves, Ohlott, and Ruderman (2007) further support this thinking by defining the concept of *work-life*

enhancement as “facilitation that occurs when one role increases energy and attitude, and contributes to the development of skills in the other role” (as cited in McMillan et al., 2010, p. 11). The Inter-Role Conflict Survey asks the participant to rate how the nine roles on the left-hand side of the matrix impact the nine roles on the top of the matrix, using a scale from -2 to +2 (see Table 2). Participants are instructed to leave the intersection of identical roles blank (e.g., student on the left and student on the top). While the validated survey designed by Tompson and Werner (1997) had 10 roles, the researcher removed the role of hobby and assumed its categorization under the role of other.

Section 6, Feedback, allows survey participants to provide open-ended feedback on work-life balance or sai; and on the survey itself. This was the only portion of the online survey that permits unrestricted responses. See Appendix G for the actual survey instrument.

Table 2

Inter-Role Conflict Survey Scale

+2	participation in the role on the left has a very facilitative or helpful effect on the role on the top
+1	participation in the role on the left has a somewhat facilitative or helpful effect on the role on the top
0	participation in the role on the left has no effect on the role on the top
-1	participation in the role on the left has a somewhat harmful or conflicting effect on the role on the top
-2	participation in the role on the left has a very harmful or conflicting effect on the role on the top
N/A	role does not pertain to me

Interview

The qualitative portion of this study was intended to further assess and give context to the effect of the balance, or lack thereof, of work and life roles on

the self as an instrument. The one-on-one interview tool was comprised of four sections (see Table 3): understanding of SAI, impact of work on nonwork, impact of nonwork on work, and self-care.

Table 3

Interview Sources

Sections		Questions		Sources
1.	Self as instrument	1-2	Understanding and manifestation of self as instrument	Researcher selected
2.	Impact of work on nonwork	1	Demands of work	Bacharach, Bamberger, and Conley (1991)
		2	Time spent at work	
		3-4	Advantages and disadvantages of work	
3.	Impact of nonwork on work	1	Demands of home, family, personal, and/or social life	Bacharach et al. (1991)
		2	Time spent at home, with family, on personal, and/or on a social life	
		3-4	Advantages and Disadvantages of home, family, personal, and/or social life	
4.	Self-care	1	Methods of Self-care	Researcher selected
		2	Methods to get centered	

Section 1, SAI, includes two questions to ascertain that the participant understands the concept of SAI and how it manifests in their lives. The concept of SAI is vague. Therefore, it needs to be understood in the population being studied prior to analyzing its affects. (Jamieson et al., 2010)

Section 2, Impact of Work on Nonwork, utilizes the validated questions developed by Bacharach et al. (1991) for the work-home conflict among nurses and engineers. Questions were modified to learn about how the demands (mental strain) and the time spent at work affects the interviewee's nonwork environment. Questions 3 and 4 focused on the advantages and disadvantages of work on other aspects of the interviewee's life.

Section 3, Impact of Nonwork on Work, was a duplicate of the questions from Section 2 (with minor modifications).

> Work-related time conflict is generally based on the number of hours that an individual works per week. [Also] family-related time conflict involves the amount of time spent with family or dealing with family members detracting from time that could be spent at work" (McMillan et al., 2010, p. 9).

Therefore, the four questions from the previous section were altered to ascertain how the interviewee's nonwork responsibilities affect his or her work.

Section 4, Self-care, was created to gather data on self-care methods as well as practices that help the interviewee get self-centered. As Jamieson et al. explain, " . . . our ability to choose gets compromised by our own . . . inability to stay centered in the present situation" (2010, p. 6). Therefore, it is important to have methods and practices, such as, reflection and meditation, to get ourselves quiet and grounded.

The interviewee also was asked if he or she would like to add anything about either their work-life balance or their self-instrument that might not have been addressed by the researcher in the course of the interview. See Appendix H for the actual interview protocol.

Data Analysis Procedures

Data analysis was performed in three stages: analysis of the survey data, analysis of the interview data, and synthesis of the combined data. These steps are described in detail in the sections below.

Survey

Survey responses were analyzed through descriptive statistics using Statistical Package for the Social Sciences software. Responses were

considered in the categorization of variables—questions pertaining to physical strain at work were grouped into one variable, questions pertaining to cognitive strain during nonwork activities were groups into another variable, etc.—and all identified variables were then analyzed in relation to one another. The researcher looked for correlations in the quantitative data and made comparisons between the strain of work and life, as well as their effects on the self instrument.

Frequency statistics were calculated for the three sets of demographic variables—basic demographics (such as gender, age, marital status, and family size); work and nonwork hours; and interview participation. Descriptive statistics were calculated for each of the remaining four sets of survey scales—work-nonwork role strain (job-family role strain scale); measure of physical stress at work (work-related DAI and burnout measures); measure of physical stress in a nonwork environment (work-related DAI and burnout measures); and roles (inter-role conflict survey).

To gain further insight, an analysis of variance (ANOVA) was performed to determine whether the scores for the four sets of survey scales (six actual surveys) varied based on levels of stress and the demographic groupings by hours worked, hours spent on nonwork tasks, and hours spent on caring for self.

Spearman correlations were performed to determine the nature and significance of the relationships among the study variables. In particular, the relationships among the following variables were tested: (a) role strain, (b) work-related burnout, (c) work-related DAI, (d) nonwork-related burnout, and (e) nonwork-related DAI.

Interview Analysis

The qualitative interview transcripts were reviewed to identify similarities, differences, and themes. The interview data supplemented findings from the quantitative survey data. The interview recordings were transcribed by the researcher, upon which the researcher reviewed the transcription notes and extracted relevant pieces of data for each question. The extracted data was reviewed in entirety to gain a sense for the nature of the data. Themes were then analyzed across interview questions multiple times—first, into broad themes and then into more focused categories. The researcher coded the data for each question according to the identified themes. These themes were revised and recoded as needed. The number of participants reporting each theme was calculated when the analysis was complete. Lastly, to maintain integrity, a second rater reviewed the results of the data analysis to confirm the validity of the analysis.

Combined Analysis and Synthesis

Following analysis of the survey data and the interview data, the combined data was examined to determine the findings for each research question. Table 4 reports how the data and data analyses were used to answer the research questions.

Summary

This chapter reported the methods used in this study to determine the effect of work-life balance, or lack thereof, on SAI among the MSOD community. The research design, sample, data collection, protection of human subjects,

development of the instrument, and data analysis procedures were outlined. Chapter 4 describes the study findings.

Table 4

Data Analysis Procedures

Research Question		Sources		Analysis Procedure
1.	How does work affect the nonwork and vice-versa?	Survey:	Work-nonwork role strain Measure of physical stress at work Measure of physical stress in a nonwork environment	Categorized survey and interview data into work-nonwork and nonwork-work, then into qualitative and quantitative, and then further into physical and cognitive impacts
		Interview:	Impact of work on nonwork Impact of nonwork on work	
2.	How is the physical self (See) affected by work-life balance or imbalance?	Survey:	Work-nonwork role strain Measure of physical stress at work Measure of physical stress in a nonwork environment	Content analysis of both survey and interview data
		Interview:	Impact of work on nonwork Impact of nonwork on work	
3.	How is the cognitive self (Know) affected by work-life balance or imbalance?	Survey:	Work-nonwork role strain Measure of physical stress at work Measure of physical stress in a nonwork environment	Content analysis of both survey and interview data
		Interview:	Impact of work on nonwork Impact of nonwork on work	
4.	How is the action of the self (Do) affected by physical and cognitive strain?	Survey:	Work-nonwork role strain Measure of physical stress at work Measure of physical stress in a nonwork environment	Analysis of the previous two questions—the See and the Know—and based on literature outlined in chapter 2
		Interview:	Impact of work on nonwork Impact of nonwork on work	
5.	What is ideal for 'self-care'?	Survey:	Demographic data	Content analysis of both survey and interview data
		Interview:	Methods of self-care Methods to get centered	

Chapter 4

Results

The purpose of this study is to determine the effect of work-life balance, or lack thereof, on SAI among consultants from a physical, cognitive, and action perspective. This chapter presents the results of the study on a community of individuals who were students or alumni of the Pepperdine University MSOD program. Survey results are presented first, including descriptive statistics and analysis of variance based on demographic groupings, correlational analysis, and role influences. The interview results are provided next, followed by a summary of findings.

Survey Results

Descriptive statistics were calculated for role strain, work-related burnout, work-related DAI, nonwork-related burnout, and nonwork-related DAI. The scaling for the three surveys (role strain, burnout, and DAI) were different, a low score could be allotted to a score of up to 2.99, depending on the variable. Specifically, role strain used a five-point scale, burnout used a seven-point scale, and DAI used a four-point scale. The following tables report descriptive statistics and analysis of variance results for the variables based on demographic groupings.

Descriptive Statistics by Marital Status

Table 6 reports the results by marital status. Married participants (N = 30) reported rather low scores for three variables: nonwork related DAI (mean = 1.60, SD = 0.39); work-related burnout (mean = 2.84, SD = 0.82), and nonwork-related burnout (mean = 2.50, SD = 0.67). They reported rather low to moderate role

strain (mean = 2.67, SD = 0.43) and moderate work-related DAI (mean = 2.37, SD = 0.45). While the non-married participants reported slightly different scores, the *t* test results revealed that the non-married participants scored differently for only one measure: nonwork-related DAI. In this case, the non-married participants scored lower than the married participants: non-married mean = 1.40, SD = 0.23, $t(44.31) = 2.18$, $p = 0.04$.

Table 6

Survey Data by Marital Status

	Married *N* = 30 Mean (*SD*)	Not Married *N* = 21 Mean (*SD*)	*t* Test Results
Role strain*	2.67 (0.43)	2.54 (0.47)	$t(40.39) = 1.04$, $p = 0.31$
Work-related Burnout**	2.84 (0.82)	3.04 (0.92)	$t(37.78) = -0.77$, $p = 0.45$
Work-related depression, anxiety, and irritability***	2.37 (0.45)	2.25 (0.44)	$t(41.38) = 0.94$, $p = 0.35$
Nonwork-related burnout	2.50 (0.67)	2.42 (0.50)	$t(44.49) = 0.51$, $p = 0.61$
Nonwork-related depression, anxiety, and irritability	1.60 (0.39)	1.40 (0.23)	$t(44.31) = 2.18$, $p = 0.04$

Scales: *1 = low role strain, 5 = high role strain; **1 = no burnout, 7 = high burnout; ***1 = low depression, anxiety, and irritability; 4 = high depression, anxiety, and irritability

Descriptive Statistics by Family Status

Table 7 reports the results by family status (whether the participant had one or more children). Participants with children (*N* = 29) reported rather low scores for three variables: nonwork related DAI (mean = 1.50, SD = 0.30); work-related burnout (mean = 2.80, SD = 0.92), and nonwork-related burnout (mean = 2.48, SD = 0.68). They reported rather low to moderate role strain (mean = 2.59, SD = 0.41) and moderate work-related DAI (mean = 2.29, SD = 0.41). The participants without children reported slightly different scores—for example, low to moderate work-related burnout score (mean = 3.06, SD = 0.74) compared to

the low score of the participants with children. However, the *t* test results revealed that these mean scores do not vary based on family status.

Table 7

Survey Data by Family Status

	Children *N* = 29 Mean (*SD*)	No Children *N* = 24 Mean (*SD*)	*t* Test Results
Role strain*	2.59 (0.41)	2.69 (0.51)	$t(44.18) = -0.75$, $p = 0.46$
Work-related burnout**	2.80 (0.92)	3.06 (0.74)	$t(48.99) = -1.12$, $p = 0.27$
Work-related depression, anxiety, and irritability***	2.29 (0.41)	2.36 (0.47)	$t(44.17) = -0.55$, $p = 0.59$
Nonwork-related burnout	2.48 (0.68)	2.51 (0.57)	$t(45.64) = -0.13$, $p = 0.90$
Nonwork-related depression, anxiety, and irritability	1.50 (0.30)	1.56 (0.39)	$t(41.41) = -0.56$, $p = 0.58$

Scales: *1 = low role strain, 5 = high role strain; **1 = no burnout, 7 = high burnout; ***1 = low depression, anxiety, and irritability; 4 = high depression, anxiety, and irritability

Descriptive Statistics by Role Strain

Table 8 compares the burnout and DAI scales using completed responses from 26 participants (*N* = 26) based on high versus moderate role strain. Participants with high role strain reported rather low scores for three variables: nonwork related DAI (mean = 1.38, SD = 0.25); work-related burnout (mean = 2.50, SD = 0.66), and nonwork-related burnout (mean = 2.20, SD = 0.49). The same population reported low to moderate work-related DAI (mean = 2.15, SD = 0.30). While the participants with moderate role strain reported different scores, the range of their scores were similar to those with high role strain, except for the work-related burnout where the participants with moderate strain displayed a low to moderate score (mean = 3.32, SD 0.83). The *t* test results revealed that all work and nonwork variables differed based on role strain (all $p < 0.01$).

Table 8

Survey Data by Role Strain

	High Strain *N* = 26 Mean (*SD*)	Moderate Strain *N* = 26 Mean (*SD*)	*t* Test Results
Work-related burnout**	2.50 (0.66)	3.32 (0.83)	*t*(47.52) = -3.92, *p* = 0.00
Work-related depression, anxiety, and irritability***	2.15 (0.30)	2.49 (0.48)	*t*(49.00) = -3.07, *p* = 0.00
Nonwork-related burnout	2.20 (0.49)	2.76 (0.62)	*t*(44.89) = -3.47, *p* = 0.00
Nonwork-related depression, anxiety, and irritability	1.38 (0.25)	1.67 (0.37)	*t*(41.90) = -3.18, *p* = 0.00

Scales: *1 = low role strain, 5 = high role strain; **1 = no burnout, 7 = high burnout; ***1 = low depression, anxiety, and irritability; 4 = high depression, anxiety, and irritability

Descriptive Statistics by Hours spent on Work

The survey data were analyzed to determine if any differences in scores were exhibited based on participants' number of work hours (see Table 9). Of the five variables, differences emerged for only two: role strain: df (4, 47) = 2.81, sig. = .04 and work DAI: df (4, 46) = 2.57, sig. = .05.

Participants who worked 20-30 hours reported the least role strain (mean = 2.44, SD = 0.46), compared to participants who worked 50-60 hours (mean = 2.99, SD = 0.38). Interestingly, participants who worked 30-40 hours exhibited higher role strain that those who worked 40-50 hours and those who worked more than 60 hours exhibited less role strain than those who worked 50-60 hours. It is possible that these individuals' amount of nonwork responsibilities might account for the differences.

Work DAI exhibited a similar pattern as role strain. Participants who worked 20-30 hours reported the least work-related DAI (mean = 2.08, SD = 0.52) and participants who worked 50-60 hours reported the most (mean = 2.56, SD = 0.50). Again, participants who worked 30-40 hours exhibited higher work

DAI than those who worked 40-50 hours and those who worked more than 60 hours exhibited less work-related DAI than those who worked 50-60 hours. Interestingly, participants who worked more than 60 hours displayed a lower work-related DAI than participants who worked between 30 and 60 hours. Here, too, it is possible that individuals working more than 60 hours may not have a high amount of nonwork responsibilities.

Table 9

Survey Data by Work Hours

Variable	Hours Worked	*N*	Mean	SD	ANOVA
Role Strain*	20-30 hours	4	2.44	0.46	df (4, 47) = 2.81, sig. = .04
	30-40 hours	12	2.69	0.51	
	40-50 hours	24	2.48	0.39	
	50-60 hours	9	2.99	0.38	
	More than 60 hours	3	2.87	0.52	
Work depression, anxiety, and irritability**	20-30 hours	4	2.08	0.52	df (4, 46) = 2.57, sig. = .05
	30-40 hours	12	2.53	0.53	
	40-50 hours	23	2.19	0.25	
	50-60 hours	9	2.56	0.50	
	More than 60 hours	3	2.15	0.53	

Scales: *1 = low role strain, 5 = high role strain; **1 = low depression, anxiety, and irritability; 4 = high depression, anxiety, and irritability; ANOVA = Analysis of variance

An analysis of variance for the variables was performed based on nonwork hours spent; however, no significant differences across the means were discovered.

The survey data were analyzed to determine if any differences in scores were exhibited by participants' number of hours spent on self (see Table 10). Of the five variables, differences emerged for three—role strain: df (4, 47) = 2.97, sig. = .03; work burnout: df(4, 46) = 3.56, sig. = .01; and work DAI: df (4, 46) = 2.57, sig. = .05.

Participants who spent more than 10 hours on self-care reported the least role strain (mean = 2.41, SD = 0.35), compared to participants who spent 2-5 hours on self-care (mean = 2.88, SD = 0.47). Statistics show that participants that spent 5-7 hours and 7-10 hours on self-care experienced the same level of low to moderate role strain. Curiously, participants who spent less than 2 hours on self-care exhibited a lower role strain that those who spent 2-5 hours. It is possible that latter group's amount of time spent on self-care impeded on their familial or social roles without offering sufficient self-care benefits, thus, accounting for the differences.

Lower burnout rates were exhibited by participants who spent more than 5 hours on self-care. The lowest burnout rate was reported for the group spending 5-7 hours on self-care (mean = 2.45, SD = .59). Participants spending less than 5 hours, on average, showed a low to moderate burnout rate. Curiously participants spending 2-5 hours on self-care (mean = 3.46, SD = .90) exhibited a higher burnout that those spending less than 2 hours on self-care (mean = 3.01, SD = .94). There may be a possibility that those spending less than 5 hours on self-care are spending quantity, not quality, on the self and are, therefore, not getting the sufficient benefits of quality time spent on self—resulting in a higher level of burnout.

Work DAI exhibited a similar pattern as burnout. Participants who spent more than 5 hours on self-care reported low work-related DAI. The lowest scores were reported among those who spent 5-7 hours on self-care (mean = 2.10, SD = 0.22). Participants who spent 2-5 hours on self-care reported the most work-related DAI (mean = 2.54, SD = 0.57). Interestingly, again, participants spending

2-5 hours on self-care exhibited a higher work-related DAI that those spending less than 2 hours on self-care (mean = 2.48, SD = .47). Here, too, it is possible that individuals spending 2-5 hours per week on self are “borrowing” these hours from time they could or should spend on work, without reaping the benefits of a cared-for self.

Table 10

Survey Data by Self-Care

Variable	Hours Worked	*N*	Mean	SD	ANOVA
Role Strain*	Less than 2 hours	7	2.83	0.47	Df(4, 47) = 2.97, sig. = .03
	2-5 hours	16	2.88	0.47	
	5-7 hours	13	2.47	0.45	
	7-10 hours	9	2.47	0.29	
	More than 10 hours	7	2.41	0.35	
Burnout**	Less than 2 hours	7	3.01	0.94	Df(4, 46) = 3.56, sig. = .01
	2-5 hours	16	3.46	0.90	
	5-7 hours	13	2.45	0.59	
	7-10 hours	9	2.81	0.80	
	More than 10 hours	6	2.52	0.38	
Work depression, anxiety, and irritability***	Less than 2 hours	7	2.48	0.47	Df(4, 46) = 2.79, sig. = .04
	2-5 hours	16	2.54	0.57	
	5-7 hours	13	2.10	0.22	
	7-10 hours	9	2.27	0.34	
	More than 10 hours	6	2.12	0.14	

Scales: *1 = low role strain, 5 = high role strain; **1 = no burnout, 7 = high burnout; ***1 = low depression, anxiety, and irritability; 4 = high depression, anxiety, and irritability; ANOVA = Analysis of variance

Correlational Analysis

Spearman correlations were performed to examine the relationships among the study variables (see Table 11 The results showed that all the variables were positively and significantly related. That is, when one variable increases, the other variables also increase, and vice versa. For example, when work-related burnout is high, role strain also tends to be high. Importantly, correlation does not suggest causality. This means that it is unclear which of these variables act on the others or whether other variables act on the study

variables, causing them to increase or decrease. For example, the management style of a worker's supervisor might cause role strain, burnout, and DAI to increase.

Table 11

Spearman's Correlation Results

	Role strain	Work-related burnout	Work-related DAI	Nonwork-related burnout	Nonwork-related DAI
Role strain	1				
Work-related burnout	.55 (.00)	1			
Work-related DAI	.48 (.00)	.72 (.00)	1		
Nonwork-related burnout	.54 (.00)	.63 (.00)	.53 (.00)	1	
Nonwork-related DAI	.52 (.00)	.47 (.00)	.74 (.00)	.57 (.00)	1

DAI = depression, anxiety, and irritability

Role Influences

In an attempt to gain insights about the direction of influence among the variables, participants were asked to indicate the influence of their various professional and personal roles had on each other (see Table 12). Though no significant results could be extrapolated from this survey set, there were some interesting patterns. Roles of Spouse, Primary Caregiver, and Religious Participants showed the most and the highest positive effects on the other roles, followed closely by roles such as Volunteer, Student, and Friend. It could be speculated that the sense of responsibility and discipline one acquires through being a spouse and a caregiver helps one succeed in one's other roles in life. Though the homecare-related roles such as Spouse and Primary Caregiver had a helpful effect on a majority of the roles, the role of Home Maintainer, surprisingly and inversely, had a somewhat negative effect on the roles of

Spouse and Friend—suggesting that, perhaps, one taking care of the household has too much role strain and too little time left after all their home demands to be an efficient spouse or a friend.

Table 12

Role Influences on Each Other

	Student	Employee	Spouse	Primary Caregiver	Volunteer	Home Maintainer	Friend	Religious Participant	Other
Student		1.61 (1.38) *N* = 31	2.20 (1.77) *N* = 30	1.21 (1.79) *N* = 28	2.07 (1.86) *N* = 28	2.54 (1.75) *N* = 28	2.59 (1.62) *N* = 29	1.61 (1.55) *N* = 28	1.14 (1.92) *N* = 14
Employee	1.79 (1.55) *N* = 28		2.19 (1.38) *N* = 32	1.20 (1.66) *N* = 25	2.11 (1.40) *N* = 28	2.66 (1.52) *N* = 29	2.39 (1.12) *N* = 31	1.68 (1.44) *N* = 28	.83 (1.53) *N* = 12
Spouse	1.55 (1.59) *N* = 29	1.75 (1.24) *N* = 32		.64 (0.91) *N* = 25	1.89 (1.40) *N* = 28	1.57 (1.28) *N* = 30	1.74 (1.21) *N* = 31	1.37 (1.31) *N* = 27	.55 (1.04) *N* = 11
Primary Caregiver	1.33 (1.96) *N* = 27	1.64 (1.98) *N* = 25	.92 (1.32) *N* = 26		1.48 (1.90) *N* = 25	1.19 (1.52) *N* = 26	1.35 (1.60) *N* = 26	1.00 (1.44) *N* = 25	.00 (0.00) *N* = 11
Volunteer	2.12 (1.81) *N* = 25	1.92 (1.23) *N* = 26	1.69 (1.38) *N* = 26	1.22 (1.76) *N* = 23		2.50 (1.53) *N* = 24	1.79 (1.18) *N* = 24	1.50 (1.25) *N* = 24	.33 (1.00) *N* = 9
Home Maintainer	2.76 (1.56) *N* = 25	3.12 (1.17) *N* = 25	2.00 (1.44) *N* = 26	1.33 (1.44) *N* = 24	2.54 (1.44) *N* = 24		3.04 (0.74) *N* = 25	2.12 (1.48) *N* = 24	.33 (1.00) *N* = 9
Friend	1.93 (1.30) *N* = 27	2.07 (0.96) *N* = 29	1.52 (0.99) *N* = 29	1.08 (1.32) *N* = 25	2.08 (1.08) *N* = 25	2.00 (1.24) *N* = 27		1.56 (1.19) *N* = 25	.33 (1.00) *N* = 9
Religious Participant	1.52 (1.42) *N* = 25	1.52 (1.16) *N* = 25	1.08 (1.08) *N* = 25	.74 (1.21) *N* = 23	1.38 (1.10) *N* = 24	1.96 (1.40) *N* = 24	1.50 (1.10) *N* = 24		.56 (1.13) *N* = 9
Other	.36 (1.21) *N* = 11	.43 (1.13) *N* = 7	.38 (1.06) *N* = 8	.00 (0.00) *N* = 9	.56 (1.67) *N* = 9	.38 (1.06) *N* = 8	.43 (1.13) *N* = 7	.67 (1.32) *N* = 9	

Note. *N* = 53; Scale: 1 = participation in the role on the left has a very facilitative or helpful effect on the role on the top, 2 = participation in the role on the left has a somewhat facilitative or helpful effect on the role on the top, 3 = participation in the role on the left has no effect on the role on the top, 4 = participation in the role on the left has a somewhat harmful or conflicting effect on the role on the top, 5 = participation in the role on the left has a very harmful or conflicting effect on the role on the top

Interview Results

Six participants were asked about several concepts during the interview: definitions and manifestations of SAI, the impacts of work life and nonwork life on the other, and methods of self-care. This section describes the results derived from the qualitative portion of this study.

SAI—Definition

Participants provided four definitions of SAI (see Table 13). The most common definition, voiced by four participants, was the effective use of self. One participant shared that this meant the “ability of a person to use themselves in a change process—knowing how to using their behavior, their words, and their body language.” Another explained that it referred to “allowing the use of self to the fullest when interacting with others, when working, when observing and paying attention to others’ emotions. It’s the five senses concept—looking, watching, listening, feeling, observing.” Two participants defined SAI as having awareness of one’s interactions with others and environment. One of these participants elaborated that given SAI, the “person is extremely aware of their interaction with their environment and others; and vice versa—how the environment and others affect them.”

Another definition was that SAI meant awareness of self and others, meaning “understanding one’s self and one’s reactions to better understand others’ reactions.” The final definition offered was of an optimized self, where “the body, as an instrument, is in tune with good physical, emotional, and spiritual care—both external and internal.”

Table 13

Definitions of Self as Instrument

Definition	*N*
Effective use of self	4
Awareness of interactions with others and environment	2
Awareness of self and others	1
Optimized self	1

N = 6

SAI—Manifestation

Participants also offered four manifestations of SAI (see Table 14). These manifestations were identical to the participants' definitions; however, the number of participants reporting each manifestation varied from the number of participants reporting these aspects of SAI as definitions. The most common manifestation, cited by three participants, was awareness of self and others. One participant elaborated that her SAI showed up as

> . . . paying attention to what's happening within myself as well as the signal from my clients—informing me on when to pause to allow the client to experience their moment, or when to ask questions to further and deepen the learning.

Two participants expressed that their SAI manifested as effective use of self. One of these participants explained,

> In my life, I have multiple roles. I try to bring skills that I have developed in these different areas . . . [such as] administrative skills that work or things like knowledge of technology and things like that in order to effectively do the job. I have been able to develop certain parenting skills and techniques for discipline, or homework, or intervention, or those types of things and really apply those in my own family.

Two participants shared that their SAI enabled them to have awareness of their impact on others. One participant described that SAI helped her achieve an

optimized self, meaning “the more in-tune, the more put-together my instrument is, the better I’m able to work with others.” She added,

> When I get to a point when I’m run down, ragged, sick, emotionally exhausted, then I don’t have the same level of ability to work with others, support others, and serve others. When I’m feeling run down, I don’t work as well for myself or with others. When I’m at the top of my game—fine-tuned—spiritually, emotionally, then I feel very effective, very good energy with my interactions and with my work.

Table 14

Manifestations of Self as Instrument

Manifestation	*N*
Awareness of self and others	3
Effective use of self	2
Awareness of one’s impact on others	2
Optimized self	1

N = 6

Positive Work Impact on Nonwork

Participants were asked to describe both the positive and negative impacts their work life had on their nonwork life. Participants identified six positive impacts (see Table 15). Three of these impacts were mentioned by four participants each: higher standard of living, personal fulfillment and validation, and enhanced personal relationships. In terms of higher standard of living, participants cited being able to contribute to the household income, take care of one’s own needs, and go to school. In terms of fulfillment and validation, participants explained,

> I find my work to be fulfilling. I feel like I accomplish things at work, providing me with an external validation of myself.
>
> Provided me validation to start my own business and to feel like I’m making a positive contribution to society.

The final impact mentioned by four participants was enhanced personal relationships. One person shared how her work enhanced her ability to relate with others in her life:

> I'm a professional facilitator. So, in my primary relationship, my marriage, the advantage would be that both of us understand what it means to be emotionally triggered. We both now can have deeper conversations and therefore navigate through challenging conversations. I'm a better parent because I have an understanding of how both of my children operate. The friendships that I have are really deep because I'm able to go deep.

Another commented that work "sets up important connections for me in people that I really respect and get to partner with."

Two participants stated that work allowed them time and energy for their personal lives. One explained, "My day job is not that busy or demanding, so it gives me time outside of work to spend on other things that are important to me." Another two participants appreciated the growth and development that work afforded. One person elaborated, "Work has provided me opportunities that have helped me to grow my skills." The final impact, mentioned by one participant, was enhanced self-determination. This person shared, "Because I'm self-employed, I have the ability to structure my work, as I want to."

Table 15

Positive Impacts of Work Life on Nonwork Life

Impact	*N*
Higher standard of living	4
Personal fulfillment and validation	4
Enhanced personal relationships	4
Time and energy for personal life	2
Growth and development	2
Enhanced self-determination	1

N = 6

Negative Work impact on Nonwork

Participants identified five negative impacts of their work life on their nonwork life (see Table 16). All six participants expressed that work resulted in them having elevated stress and anxiety during their personal time. They explained,

> I can let the anxiety of work affect my personal life. Stress from work makes me less focused and does not allow me to relax as much and be in the moment.
>
> Challenge for me to separate a bad day at work and not take it home. The work I'm doing is not personally rewarding, which affects my mental state. It's a challenge for me to try to maintain a positive attitude.
>
> I am committing everything to work and I'm not able to share the same knowledge, expertise, and energy outside the work environment.

All participants also stated that work limits the time they have for personal life. Participants elaborated,

> Consulting work takes a significant amount of time away from my personal life and time with family and friends. . . . I have to and try to carve out some personal time for myself as well as carving out time for family and friends. I live my work, which has a significant impact on my personal life and me because I spend most of my time working.
>
> I have to make sacrifices, in my personal life as I'm not able to sometimes do the things I wish I could get done because of the demands of my schedule. I never feel like I have a day off.
>
> There are times that I wish I had a little bit more time for myself to go exercise or attend events that my children participate. And, socially, it's kind of hard to make plans with people depending on where they are and what their availability is if you have a regular schedule and you're working.

Four participants shared that they often are not mentally present during personal time:

> I find it sometimes difficult to sign off or check out, mentally, from work. I don't fully enjoy my personal life as much because I feel a twinge of responsibility or a pull of obligation to handle work.
>
> Cognitively, my work has a very big impact on my personal life. My brain is more exhausted, less able to be present, less able to think through and have meaningful conversations, and sometimes even - less interested to see other people.

Three participants also stated that work resulted in strained personal relationships:

> Socially, my friendships can get strained, I can be less engaged with wanting to talk.
>
> My personal friends and family have become my clients, because I'm a coach—this causes a weird dynamic and prevents me from completely discharging and relaxing with friends and family.

Finally, one participant explained that her work heightened her awareness, sometimes leading to unpleasant realizations:

> I see very easily where things get hung up and I see the possibility of how things could work so much better and in lots of situations . . . I cannot shut off what I'm seeing and I also know that I cannot change someone else until they're ready. . . . That's probably one of the hardest part of parenting.

Table 16

Negative Impacts of Work Life on Nonwork Life

Impact	*N*
Elevated stress and anxiety during personal time	6
Limited time for personal life	6
Not mentally present during personal time	4
Strained relationships	3
Enhanced awareness leading to unpleasant realizations	1

N = 6

Negative Nonwork Impact on Work

Participants also were asked to describe the negative and positive impacts of their nonwork life on their work lives. Participants identified three negative

impacts (see Table 17). Five participants stated that their personal responsibilities reduced the time they had available for work. They elaborated,

> Since I work from home, it is very easy for me to get distracted from my work by focusing on household chores. So, I've been practicing time blocking specifically for myself, for family and friends, and for work.
>
> Because I'm single and there are some things that I have to do myself during work hours because stores are open during work hours, I have to take time out of work to take care of personal things.
>
> I have a heightened level of responsibility for what's happening at home—feeling like I have to make sure every little thing is taken care of at home before I walk out the door. It can cause me to get a little negative or frustrated, or to even be late coming into work, or it can be distracting.

Two participants shared that interpersonal conflict in their personal lives can reduce their energy for work. One explained, "If I walk away from my friends and family feeling exhausted and guilty for not being there for them, then I'm more exhausted, making it very hard to enter into my work."

One participant added that role conflict due to her profession affects her work life. She explained, "Lines are blurred between having a personal friendship, personal experiences, personal life and the sense of always working because so much of my personal life is involved in my business life."

Table 17

Negative Impacts of Nonwork Life on Work Life

Impact	*N*
Personal responsibilities reduce work time	5
Interpersonal conflict reduces energy for work	2
Role conflict	1

N = 6

Positive Nonwork Impact on Work

Participants also named five positive impacts of their nonwork life on their work life (see Table 18). Four participants explained that their personal relationships enhance their focus and energy for work. One shared, “I’m happy, because the foundation of my personal relationships are very strong, allowing me to build off of that and be positive at work.” Another elaborated, “The more time I spend . . . seeing my friends . . . makes me more creative and gives me a better capacity to be present at work and produce higher quality thought and be more of an engaged leader.”

Three participants emphasized that self-care enhances their focus and energy for work. They explained,

> Spending time with myself . . . helps me to maintain a positive attitude, focus better on my work, and have the energy to deal with tasks in the office.
>
> Taking the time to get a massage, go to the chiropractor, getting a manicure-pedicure gives me the physical and emotional strength and the fun side of life to be able to come in and do my work.

Other positive impacts, each mentioned by one participant included having a source of clients; gaining a sense belonging, identity, and strength; and having conversations that inspire her work.

Table 18

Positive Impacts of Nonwork Life on Work Life

Impact	*N*
Personal relationships enhance my focus and energy for work	4
Self-care enhances my focus and energy for work	3
Source of clients	1
Sense of belonging, identity, and strength	1
Personal conversations inspire my work	1

N = 6

Cognitive Self-Care

Participants were asked to describe the practices they used for self-care and for centering. Eight types of cognitive activities were named (see Table 19). Spirituality related practices, such as prayer, meditation, breathing exercises, yoga, and grounding practices were cited most often. Five participants used these for self-care and all six participants used these to help them center. The second most commonly cited practice was entertainment, including reading, watching television or movies, and listening to music. Four participants used entertainment for self-care and five participants used entertainment for centering. The third most common practice was self-oriented activities, such as alone time, self-talk, and journaling. Two participants use it for self-care and three participants use it for centering.

Table 19

Cognitive Methods of Self-care and Centering

Method	Used for Self-care	Used for Centering
Spirituality Spiritual Practice/Prayer Meditation, breathing exercises Yoga Grounding practices	5	6
Entertainment Reading Watching TV/movies Listening to music	4	5
Self-oriented activity Alone time Self Talk Journaling	2	3
Thankfulness Journaling 'gratitudes' Take time out of day to be thankful for what I have in life	3	
Time with family and friends, social time	3	
Daily intention setting, manifesting	1	2
Have a business coach	1	
Creating to-do lists		1

N = 6

Physical Self-Care

Eight types of physical activities also were named (see Table 20). The most commonly cited practice was exercise, yoga or hiking. Five participants used these types of activities for self-care and three used them for centering. The next commonly cited practice was eating right, cited by three participants as a form of self-care. Two participants stated they nurtured their physical body through activities such as chiropractic care, massage, manicures, and pedicures as a form of self-care.

Table 20

Physical Methods of Self-Care

Method	Used for Self-care	Used for Centering
Exercise, yoga, hiking	5	3
Eating right	3	
Nurturing physical body: Chiropractic care, massage, manicure, pedicure	2	
Dog walking	1	1
Gardening		1
Indulging in nice things (e.g., dinner)	1	
Taking breaks		1
Dancing	1	

N = 6

Summary of Findings

The Role Strain scale is significantly affected by the hours one spends on self and at work. Role strain among the 52 responders seemed to range from somewhat low to moderately high (see Table 21). Since the mean varied by work hours and self-care, it may be presumed that more time spent on caring for self reduced the strain on one's roles in life (with the exception of the anomalous findings of role strain for spending 2 to 5 hours on self). Spending large amounts of time at work pushes the strain on the roles toward the higher end (again, with

a few exceptions and anomalies). Role Strain proved significant enough to have impact on work and nonwork burnout and DAI.

Table 21

Summary of Variables

	Range	Mean	Means vary by
Role Strain	1.64-3.63	2.64 (.46)	Work hours Self-care
Work-related burnout	1.33-5.52	2.91 (.85)	*Role strain* Self-care
Work-related depression, anxiety, and irritability	1.69-3.69	2.32 (.44)	*Role strain* Work hours Self-care
Nonwork-related burnout	1.20-3.76	2.49 (.62)	*Role strain*
Nonwork-related depression, anxiety, and irritability	1.00-2.54	1.53 (.35)	*Marital status* *Role strain*

N = 52; Scales: *1 = low role strain, 5 = high role strain; **1 = no burnout, 7 = high burnout; ***1 = low depression, anxiety, and irritability; 4 = high depression, anxiety, and irritability; all variables were significantly related to each other at the .01 level

SAI

As would be expected, a majority (over 66%) of the participants interviewed defined SAI as how effectively one uses the self (see Table 22). Half the interviewees explained that SAI manifested in their lives as awareness of one's self and his or her interaction with others. It can be concluded that the understanding and usage of SAI are in alignment across study participants, satisfying concerns expressed in chapter 2.

Table 22

Summary of Self as Instrument Findings

Definition
Effective use of self (4)
Awareness of interactions with others and environment (2)
Manifestations
Awareness of self and others (3)
Effective use of self (2)
Awareness of one's impact on others (2)

N = 6

Role Influences

Though the Role data did not produce conclusive results, some interesting finds did emerge (see Table 23). Being a spouse or the primary caregiver affected the other roles in one's life in a positive manner. At times, that effect was very strong and, at other times, it was merely helpful. Being a home maintainer negatively affected one's ability to being a successful spouse and friend. This discrepancy or anomaly could be attributed to ambiguity on the description of the role(s). Assuming that a home maintainer contains qualities of both being a spouse and a primary caregiver, then the negative effects could be justified as the effect of having two simultaneous roles.

A common theme of contradiction and relation appears to run throughout the findings of this study. Where roles, such as being a spouse or a primary caregiver, have a positive effect on one's ability to be a home maintainer, the latter has a negative impact on the former two roles. Where personal relationships positively affect one's ability to succeed at work, the same relationships have shown to being negatively affected by one's work.

Table 23

Summary of Role Influences

Role Effects	Roles
Strong positive effect	Spouse Primary Caregiver Religious Participant
Moderate positive effect	Student Volunteer Friend
Helpful effect	Spouse Primary Caregiver
Negative effect	Home maintainer (on spouse and friend)

N = 52

Reciprocal Impacts of Work Life and Nonwork Life

Having a job has many benefits—monetary gain, a feeling of fulfillment and validation, and a wider network of personal relationships—as stated by more than 66% of the interviewees. However, these benefits come with a price (see Table 24). All the participants claimed that having a work life has stressful impacts on their nonwork lives and reduces their time for a personal life. More than 66% of the interviewees also shared that work life negatively affected them because they are not mentally present during their personal time.

Nonwork life also has benefits and drawbacks. Four of the six interviewees said that personal relationships in their nonwork life helped enhance their focus and energy at work. Three interviewees shared that their focus and energy at work also was positively impacted by spending time caring for the self. Having such relationships and dedicating time for self increases one's responsibilities, which can negatively impact the work life, as stated by more than 80% of the interviewees.

Table 24

Impacts of Work Life and Nonwork Life

	Positive Impacts	Negative impacts
Work impacts on nonwork life	Higher standard of living (4) Personal fulfillment and validation (4) Enhanced personal relationships (4) Time and energy for personal life (2) Growth and development (2)	Elevated stress and anxiety during personal time (6) Limited time for personal life (6) Not mentally present during personal time (4) Strained relationships (3)
Nonwork life impacts on work life	Personal relationships enhance my focus and energy for work (4) Self-care enhances my focus and energy for work (3)	Personal responsibilities reduce work time (5) Interpersonal conflict reduces energy for work (2)

N = 6

Self-Care Methods

While there are numerous techniques to care for the self and get oneself grounded, the interviewees appeared to prefer spiritual and physical approaches such as yoga, meditation, and exercise (see Table 25). In addition, entertainment was used—be it watching TV or listening to music—by a majority of the interviewees for self-care and centering.

Table 25

Summary of Self-Care Methods

Method	Used for Self-care	Used for Centering
Cognitive methods		
Spirituality-related practices	5	6
Entertainment	4	5
Self-oriented activity	2	3
Thankfulness	3	
Time with family and friends, social time	3	
Daily intention setting, manifesting	1	2
Physical methods		
Exercise, yoga, hiking	5	3
Eating right	3	
Nurturing physical body: Chiropractic care, massage, manicure, pedicure	2	
Dog walking	1	1

N = 6

Summary

This chapter presented the quantitative and qualitative findings of the study. Numerous findings emerged as a result of this study, which are discussed in chapter 5. Correlation between each of the identified variables exists, thus, strengthening the argument that work and nonwork physical strain affects one's level of cognitive strain. Numerous methods of self-care and ways to center one's self were identified in the survey and interview results.

The following chapter discusses these findings, identifies derived conclusions, describes implications for future research, reviews the study's limitations, and explores the impact to the field of OD.

Chapter 5

Discussion

This study determined the effect of work-life balance, or lack thereof, on SAI among consultants from a physical, cognitive, and action perspective. The See, Know, Do Model of SAI (Jamieson et al., 2010) was used as a guiding framework. The research questions were:

1. How does one's work life affect one's nonwork life, and vice-versa?
2. How is the physical self (See) affected by work-life balance or imbalance?
3. How is the cognitive self (Know) affected by work-life balance or imbalance?
4. How is the action of the self (Do) affected by physical and cognitive strain?
5. What is ideal for self-care?

This chapter concludes the study by discussing conclusions, recommendations to OD practitioners, suggestions for further research, limitations of the study, and impacts on OD.

Conclusions

Several impacts were observed between work and nonwork and vice versa (see Table 26). Although causality was not identifiable in this research study, the positive relation between the strain of roles, burnout at work and nonwork, as well as, DAI at work and nonwork, paves some ground for future research. It can be concluded that while the physical stress increases, the cognitive strain is similarly affected—thereby, making a case for the need of a

‘balanced’ physical (reduced burnout and DAI) and cognitive (less complicated roles) self.

Table 26

Reciprocal Impacts of Work and Nonwork

	Impact	Sources
Work’s Impact on Nonwork	Positive	Higher standard of living Personal fulfillment and validation Enhanced personal relationships
	Negative	Elevated Stress and anxiety during personal time Limited time for personal life Mentally not present Strained relationships
Nonwork’s Impact on Work	Positive	Personal relationships enhanced focus and energy for work Self-care enhanced focus and energy for work
	Negative	Personal responsibilities reduced time available for work-related tasks Interpersonal conflict reduced energy for work

The data gathered highlights two distinct areas that directly affect work and nonwork aspects of one’s life—personal relationships and time management. Regarding personal relationships, the study results point to an interesting symbiosis between the work and nonwork life. Personal relationships seem to build a sturdy bridge for positive impacts of work on nonwork. One such example is:

> I think that I’m able to kind of appreciate the time that I have with them in a different way than when I was with them at home all the time.
>
> Vice-versa, personal relationships enhances focus and energy for work tasks:
>
> My family and friends are big supporters of me and give me extra confidence and endurance and understanding so that I’m bolstered up as much as I can to come into work.

While having positive personal relationships leads to a strengthened work-life balance, weak personal relationships can cause reduced energy in one's work life. This can, in turn, cause a downward spiral—"This is when things start to unravel, a lack of communication occurs, stress increases and life becomes a constant struggle" (Canfield, Hansen, & Hewitt, 2000, p. 122). The downward spiral, thus, further weakens the already-strained personal relationships.

Regarding time management, the United States biographer and poet, Carl Sandburg, once said "Time is the coin of your life. It is the only coin you have, and only you can determine how it will be spent. Be careful lest you let other people spend it for you" ("Quotation Details," 2010, para. 1). Participants in this research study pointed to the strong influence of time on both the work and nonwork lives. Words such as: "I never feel like I have a day off," "I wish I had a little bit more time for myself," and "I can't take time off of work to do other nonwork activities," show the negative impacts of time to all aspects of one's life. On the flip side, participants elaborated that practicing proper time management has allowed them to reap the benefits of segmenting time for work, nonwork tasks, and self-care through comments such as, "I have to and try to carve out some personal time for myself, as well as, carving out time for family and friends" and "I've been practicing time blocking specifically for myself, for family and friends, and for work." The remaining sections discuss the conclusions related to the research questions defined for the study.

Seeing as Affected by Work-Life Balance

Married participants reported higher DAI with their personal life than unmarried participants. No impact to DAI by hours spent on nonwork-related

tasks was discernable from the survey results. While not statistically different, the higher work-related burnout of people without child(ren) could be attributed to them spending more energy or time at work because they do not have the familial responsibilities. No impact to Burnout by hours spent on nonwork-related tasks was discernable from the survey results.

Qualitative results showed positive effects of work on nonwork—personal relationships, time and energy—as well as, of nonwork on work—focus and energy. The inverse, negative effects of work on nonwork, showed limited time and strained personal relationships. Also, the harmful impact of nonwork on work was that of reduced available time and energy.

As mentioned above, personal relationships and time management can affect the work and nonwork lives of individuals in a very drastic way. Since this study focused on validating the effect of work-life balance on SAI, the two key attributes are, therefore, studied further in their impact on the self. Jamieson et al. (2010) tell us that learning about ourselves requires interaction with others time and space need to be created for a well-rounded experience. The concepts of relationships and time appeared in the data repeatedly.

Knowing as Affected Work-Life Balance

No impact to role strain by hours spent on nonwork-related tasks was discernable from the survey results. It may be possible that familial responsibilities are not very impactful on work-life balance. Qualitative results extrapolated for the cognitive impact on the self showed both positive and negative impacts, especially for the work to nonwork relationship. A sense of fulfillment and validation as well as growth and development acquired through

one's work proved to greatly enhance one's personal life. There was, however, stress and anxiety in one's personal life that came with simultaneously working full time.

While no major cognitive themes were identified for the impact of nonwork on work, participants mentioned the following:

> Taking the time to get a massage, go to the chiropractor, getting a manicure-pedicure gives me the physical and emotional strength and the fun side of life to be able to come in and do my work.
>
> The more time I spend doing things such as self-care, like seeing my friends, working out, and meditating, makes me more creative .. at work and produce higher quality thought and be more of an engaged leader.
>
> If I walk away from my friends and family feeling exhausted and guilty for not being there for them, then I'm more exhausted, making it very hard to enter into my work.

Doing as Affected by Physical and Cognitive Strain

Physical strain has a direct impact on an individual's cognitive health (emotional exhaustion. Together, these negatively impact the Doing function of SAI. For example, one participant shared, "I don't have the same level of ability to work with others, and serve others." Alternately, physical and cognitive (incorporating spiritual and emotional) wellness affect SAI in a positive way. One participant shared, "I feel very effective, very good energy with my interactions and with my work."

Cognitive strain also negatively leads to physical strain and negative impacts on the self (e.g., "my brain is more exhausted [because of stress from work"). This affects the Seeing function of SAI in that the individual is not very interested in interacting with other people—barring them from having the inter-

personal relations and communications that are important in building the toolbox of experiences. All this, then, affect SAI's Doing function (e.g., "[I am] less able to be present, less able to think through and have meaningful conversations").

A pattern has emerged. While positive impacts show up in relationships, time, energy, and focus, harmful effects also appear to be related to the same attributes. A natural conclusion is that one must strive for the equilibrium of both work and nonwork to enjoy the benefits on each one on the other.

Ideal Self-care

Regarding time spent on the self, results suggested a curious finding: that spending 2-5 hours per week on the self is more harmful on the work life than spending less than 2 hours, and that the highest benefits that can be reaped from self-care (in terms of work-related activities) for more than 5 hours per week. In terms of physical benefits (lower burnout and lower DAI at work), the ideal time that one should spend on caring for the self is 5-7 hours. For the cognitive (Roles), greater than 10 hours appears to be ideal with a mean of 2.41, however, 5-7 hours and 7-10 hours on self yielded a fairly close mean of 2.47. Combining all three survey data, it can be extrapolated that 5-7 hours of self-care per week would result in low cognitive and physical strains.

Yoga was listed as a favored method of caring for and centering the self. B.K.S. Iyengar summarized Yoga as

> an ancient but perfect science, [which] deals with the evolution of humanity. This evolution includes all aspects of one's being, from bodily health to self-realization. Yoga means union – the union of body with consciousness and consciousness with the soul. Yoga cultivates the ways of maintaining a balanced attitude in day-to-day life and endows skill in the performance of one's actions. (as cited in Ondine, 2011, para. 1-2)

The described union of the physical and cognitive is perhaps why yoga, meditation, and even exercise were found to be the most preferred method of self-care and centering one's self. As noted by one participant:

> Exercise is a tremendous relief when I feel overly stressed, chaotic, out of control, can't handle it . . . especially some kind of cardio vascular exercise brings my brain centered and focused. And some kind of yoga helps—it is probably the best centering activity I have ever done.

Somewhat polar opposite methods, entertainment, including reading, watching television and movies, or listening to music and self-oriented activity, including alone time, self talk, or journaling, were found to be commonly used and effective practices for the relief of cognitive strain. While one allowed the OD practitioner to forget the daily tensions and relax the mind, the other puts the focus on the self and on the learning in the experiences. Healthy eating is becoming a popular trend today for weight loss. The findings in this study support a more powerful benefit of eating right—caring for the self'. "e.g., "It's really simple to forget to take care of yourself, so I specifically make sure I have to take care of my own needs, eat a certain time, etc.").

Recommendations to OD practitioners

Four recommendations are offered to OD practitioners as a result of this study:

1. Awareness. OD has components of personal development. Therefore, being an OD consultant would warrant that self-awareness is critical to understanding, practicing, and exercising the methodologies to change organizations, whether the client is an individual, group, or corporation. The survey and interview participants of this study identified awareness as critical in

building SAI. The field of OD provides numerous tools to enhance self-awareness, including emotional intelligence, therapy, journaling, and self-reflection. It is, therefore, in the best interest of the OD practitioner to find a tool that suits his or her personality, needs, and capabilities to build this awareness of self.

2. Authenticity. The balance of the physical and cognitive self largely comprises simplicity in roles. As such, being aware and authentic with one's own self would highlight clearly what is important and required in terms of the relationships one has in life. The roles of spouse, primary caregiver, and friend can become overwhelming if they are looked upon as separate entities of the self. Instead, being consistently authentic in life would eliminate the complication of trying to manage the self in various relationships and the subsequent stress of how one would interact in all such roles.

3. Time management. As mentioned earlier in this chapter, time has been shown to be limited and the limiting factor in both, work, and personal life. So, it is only logical to assume that developing a disciplined schedule in life would allow for well-balanced exposure to work and nonwork experiences. Discipline here does not refer to being rigid; rather, to ensuring that time and space is made to concentrate on work as well as personal activities, such as, family, friends, chores, and self-care.

4. Personal relationships. Although this study shows inverse effects of and on personal relationships, compared to work life, personal relationships positively affect the state of mind at work. However, too much time spent at work negatively affects interactions in the personal life. There is much to learn and develop from

these data. The responses from the research participants establishes that the people in one's nonwork environment can provide ample support that manifests to being present, attentive, and energized at work. As consulting assignments can be complicated, involved, and, thereby, cognitively very tiring, maintaining cognitive stress at work would allow for work tasks to be accomplished with greater ease. If personal relationships are one approach for achieving success in the field of OD consulting, then an acceptable conclusion can be drawn that these relationships must be maintained to ensure continued accomplishment. The recommendation of time management also is relevant. When space is made to maintain and develop personal relationships, work success also will be enhanced. This will then allow for more time for personal life, thereby, creating an upward spiral of well-balanced work and nonwork experiences.

Suggestions for Further Research

Three suggestions for future research are recommended based on this study:

1. Use a smaller survey set with more clear instructions. Nearly 30% of the survey participants shared that the scales were quite cumbersome and ambiguous, especially concerning the role data. Participants commented:

> I'm not certain I understood the instructions for the last block of questions.
>
> Not clear by what you mean as self as instrument in this study. I get that you are looking at balance and happiness, adjustment, etc.
>
> I felt there was a lot left to interpretation in the last segment of this survey and am still not confident I completed it correctly or as it was designed/intended.

2. It will be interesting for future researchers to delve into the work responsibilities and the relationships (both at work and nonwork) life of people working greater than 60 hours to find the reason for anomalies, such as survey participants who worked more than 60 hours displayed a lower work-related DAI and role strain than participants who worked between 50 and 60 hours.

3. Further research or study of emotional intelligence would greatly contribute to the larger study of OD practitioners' work-life balance and SAI. As mentioned in chapter 2, emotional intelligence and cognitive intelligence are closely related. Incorporating the effects of emotional intelligence on any one or all of the topics mentioned above (OD practitioners, work-life balance, or SAI) would allow a view into a more comprehensive impact on subjects such as how to enhance one's life and how to be a better practitioner or consultant.

Limitations

Three key limitations may have influenced this study: focused population, researcher bias, and survey design.

Firstly, this research only studied people in the MSOD listserv with greater than 5 years of experience. Limiting the participants to those that were employed on a full-time basis at the time of the study further narrowed the population. Since the restrictions to participate in the research were self-regulated—the participant signed an acknowledgement that he or she fit the category—the percentage of the sample to the larger population, therefore, was difficult to extrapolate from the nearly 400 members of the email group.

Secondly, the balance of work and life is a subject that affects many. As a full-time employee striving to maintain a healthy well-rounded life, researcher

bias is a concern. While the researcher was not a participant of the study and refrained from completing the survey and interview questions, it is possible that the researcher's beliefs and assumptions about Work-Life Balance and SAI influenced data (both quantitative and qualitative) interpretation. To reduce the impact of researcher bias a second rater confirmed analysis of quantitative and qualitative data.

Thirdly, the culmination of numerous surveys for this research might have been grueling for the survey participant and probably resulted in a much smaller response rate than might have been yielded with a more manageable set of questions. The researcher received 11 comments indicating that the survey matrix at the end of the quantitative section was very confusing and left much room for interpretation. The survey was created with the full knowledge that it might be cumbersome, using previously validated tools to test the impacts of the work and family roles on each other as well as the physical and cognitive strains from these two aspects of one's life. The participants were given an insight into the length of the survey in the emails and the acknowledgement page—where the time estimated for completion of the survey was indicated to be between 20 and 30 minutes. Despite instructions to substitute friends and social life in lieu of children and family (if the latter two did not pertain to the participant), comments also were received on confusion on how one should have answered the questions pertaining to children. On the positive, one participant responded, "I felt like this assessed my work-life balance," while another stated, "Would like to see outputs of overall survey back to MSOD community." Support for this study, as a

whole, was great. One participant commented, “This is an interesting topic and I'm curious to learn what you're able to find.”

Impacts to OD

Work-life balance is a topic that benefits those striving for a well-rounded and happy life. OD practitioners understand the importance of developing the self; therefore, they may be even more interested in the effects on SAI. To date, SAI has been more of a theory than a validated construct. Using surveys to validate the balance between work and personal lives could be one way to formalize SAI. SAI, however, does not only benefit OD practitioners, but the larger population as well. Organizations could use this study, if not for its SAI component, then for the work-life balance findings to assess their employees’ satisfaction at work. By ensuring their employees have a healthy balance between work life and nonwork responsibilities, organizations can enjoy substantial benefits such as lower burnout rates and lowered employee strain, leading to improved productivity and perhaps reduced turnover rates.

Based on the findings of this research, OD practitioners should pay close attention to maintaining healthy, positive, interpersonal relationships—be it with clients or in their personal life. Mere common sense would lead one to the knowledge that having good relationships with clients is good for continuous business. However, analysis of the survey and interview results from this research shows the direct implications to a more developed self.

Common sense, again, prevails in the understanding that managing time is a useful and somewhat necessary virtue. The survey does not refute this; in fact, it strengthens this belief and further makes a case for how time

management positively affects the physical and cognitive sides of the self—resulting in how effectively one shows up in life.

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Appendix A

Core Competencies for OD practitioners

20th Edition of the Organization Change and Development Competency Effort
as of March, 2001
Prepared by Roland Sullivan, Bill Rothwell, and Chris Worley

MARKETING
An effective organization development (OD) practitioner can . . .
1. Be aware of systems wanting to change
2. Be known to those needing you
3. Match skills with potential client profile
4. Convey qualifications in a credible manner
5. Quickly grasp the nature of the system
6. Determine appropriate decision makers
7. Determine appropriate processes

ENROLLING
An effective organization development (OD) practitioner can . . .
8. Build trusting relationships
9. Present the theoretical foundations of change
10. Deal effectively with resistance
11. Help the client trust the process
12. Help the client manage emotionally charged feelings
13. Collaboratively design the change process

CONTRACTING
An effective organization development (OD) practitioner can . . .
14. Contract psychologically for collaboration
15. Help the client reflect on motivation
16. Clarify outcomes
17. Build realistic expectations
18. Conduct a mini-assessment
19. Identify the boundary of systems to be changed
20. Articulate an initial change process to use
21. Explicate ethical boundaries
22. Confirm commitment of resources
23. Identify critical success factors for the intervention
24. Clarify the role of consultant
25. Clarify the role of client
26. Begin to lay out an evaluation model

MINI-ASSESSMENT
An effective organization development (OD) practitioner can . . .
27. Further clarify real issues
28. Be aware of how one's biases influence interaction
29. Link change effort into ongoing organizational processes
30. Identify formal power
31. Identify informal power

DATA GATHERING
An effective organization development (OD) practitioner can . . .
32. Determine an appropriate data collection process
33. Determine the type of data needed
34. Determine the amount of data needed
35. Utilize appropriate mix of methods to ensure efficiency
36. Utilize appropriate mix of methods to ensure objectivity
37. Utilize appropriate mix of methods to ensure validity
38. Utilize appropriate mix of data collection technology
39. Clarify boundaries for confidentiality
40. Select a process that will facilitate openness
41. Gather data to identify future states

DIAGNOSIS
An effective organization development (OD) practitioner can . . .
42. Gather data to identify initial first steps of transition
43. Watch for deeper issues as data is gathered
44. Suspend judgment while gather data
45. Know when enough data has been gathered
46. Suppress judgment while gathering data
47. Use statistical methods when appropriate
48. Recognize what is relevant
49. Know how data from different parts of the system impact each other
50. Communicate implications of systems theory
51. Continuously assess the issues as they surface
52. Stay focused on the purpose of the consultancy
53. Utilize a solid conceptual framework based on research

FEEDBACK
An effective organization development (OD) practitioner can . . .
54. Prepare leadership for the truth
55. Involve participants so they begin to own the process
56. Synthesize the data gathered into themes
57. Create a non-threatening atmosphere
58. Facilitate complex emotional patterns

PLANNING
An effective organization development (OD) practitioner can . . .
59. Distill recommendations from the data
60. Focus action that generates high impact at lowest cost
61. Consider creative alternatives
62. Mentally rehearse adverse consequences
63. Mentally rehearse potential gains

PARTICIPATION
An effective organization development (OD) practitioner can . . .
64. Facilitate a participative decision-making process

65. Obtain direction from leadership
66. Obtain commitment from leadership
67. Co-create an implementation plan that is rooted in the data
68. Co-create an implementation plan that is concrete
69. Co-create implementation plan that is simple
70. Co-create implementation plan that is clear
71. Co-create implementation plan that logically sequences activities
72. Co-create implementation plan that is results-oriented
73. Co-create implementation plan that is measurable
74. Co-create implementation plan that is rewarded

INTERVENTION
An effective organization development (OD) practitioner can . . .
75. Reduce dependency upon consultant
76. Instill responsibility for follow through
77. Intervene at the right depth
78. Pay attention to the timing of activities
79. Facilitate concurrent interventions
80. Help manage impact to related systems
81. Re-design intervention or mindfully respond to new dynamics

EVALUATION
An effective organization development (OD) practitioner can . . .
82. Integrate research with theory and practice
83. Initiate ongoing feedback in client-consultant relationship
84. Choose appropriate evaluation methods - - that is, interviews, instruments, financial sheets—to collect evaluation information
85. Determine level of evaluation - - such as reaction, learning, behavioral change,
organizational impact, societal impact
86. Ensure evaluation method is valid
87. Ensure evaluation is reliable
88. Ensure evaluation method is practical

FOLLOW-UP:
An effective organization development (OD) practitioner can . . .
89. Establish method to monitor change during the intervention
90. Establish method to monitor change after the intervention
91. Use information to reinforce positive change
92. Use information to correct negative change
93. Use information to take next steps
94. Link evaluation with expected outcomes

ADOPTION
An effective organization development (OD) practitioner can . . .
95. Transfer change skills to internal consultant so learning is continuous
96. Maintain/increase change momentum

97. Link change process to daily life of system
98. Mobilize additional internal resources to support continued change
99. Determine the parts of the organization that warrant a special focus of attention
100. Pay attention to movement back to old behaviors
101. Move more away from project-driven change to strategy-driven change
102. Be sure customers and stakeholders are satisfied with intervention's results
103. Plan renewal/reunion events

SEPARATION
An effective organization development (OD) practitioner can . . .
104. Recognize when separation is desirable
105. Process any left over relationship issues between consultant(s) and client
106. Ensure that learning will continue
107. Leave the client satisfied
108. Plan for post-consultation contact

SELF-AWARENESS
An effective organization development (OD) practitioner can . . .
109. Clarify personal values
110. Clarify personal boundaries
111. Manage personal biases
112. Manage personal defensiveness
113. Recognize when personal feelings have been aroused
114. Remain physically healthy while under stress
115. Resolve ethical issues with integrity
116. Avoid getting personal needs met at the expense of the client (i.e., financial, emotional, sexual, etc.)
117. Work within the limits of your capabilities
118. Perform effectively in an atmosphere of ambiguity
119. Perform effectively in the midst of chaos

INTERPERSONAL
An effective organization development (OD) practitioner can . . .
120. Develop mutually trusting relationships with others
121. Solicit feedback from others about your impact on them
122. Energize others
123. Collaborate with internal/external OD professional
124. Balance the needs of multiple relationships
125. Listens to others
126. Pay attention to the spontaneous and informal
127. Consistently maintain confidentiality
128. Interpersonally relate to others
129. Use humor effectively

OTHER

An effective organization development (OD) practitioner can . . .

130. Interpret cross-cultural influences in a helpful manner
131. Handle diversity and diverse situations skillfully
132. Communicate directions clearly to large groups
133. Use the latest technology effectively
134. Use the internet effectively
135. Facilitate small group interventions (up to 70)
136. Facilitate large group interventions (70-2,000)
137. Apply the skills of international OD effectively
138. Function effectively as an internal consultant
139. Demonstrate ability to conduct transorganizational development
140. Demonstrate ability to conduct community development
141. Be aware of the influences of cultural dynamics on interactions with others

Based on input from members of the Organization Development Network, the Organization Development Institute, the Academy of Management, the Minnesota OD Network, and numerous other Associations, from selected university OD program directors, and from over 3000 other individuals from around the world.

For further information: roland@rolandsullivan.com

Appendix B

Survey Invitation Email

Dear MSOD listserv Member,
I am currently a student at Pepperdine University and am in the process of conducting research for my thesis project. In my study I am researching the effect of Work-Life balance, or lack thereof, on the Self as Instrument.

I am conducting this survey to learn about your work-life balance and explore how that affects your Self as Instrument, and I invite you to take the survey.

Your participation is strictly voluntary and your responses will be kept anonymous and confidential. Completion of the survey will take approximately 20 to 30 minutes.

Click here to take the survey: https://www.surveymonkey.com/s/WLB_SAI

The deadline to participate in this survey is **Saturday, February 19th, 2011.** Please let me know if you have any questions and I hope you decide to take the survey.

Thank you,
Soumya Naidu

Candidate, Master of Science in Organization Development
440.241.4365
soumya.naidu@pepperdine.edu

Appendix C

Survey Consent Form

As a student in the Master of Science in Organization Development program at Pepperdine University, Graziadio School of Business and Management, I am currently recruiting individuals for my study entitled, “The Effect of Work-Life Balance on the Self as Instrument.” The professor supervising my work is Dr. David W. Jamieson.

This study is designed to investigate if the balance or, lack thereof, in work and life has any effect on how we maintain ourselves as fine-tuned instruments. Self as Instrument (SAI), in this study, will be identified using the ‘Use of Self Competencies and Levels’ model conceptualized by David Jamieson, Matthew Auron, and David Shechtman, which addresses the physical, cognitive, and actionable aspects of the self. As a member of the MSOD community, your familiarity with the SAI concept will yield an enriched review of its relationship with the balance of work and life, or lack thereof. I am inviting you, therefore, as a valued member of this community to participate in this study. To ensure that a more established work-nonwork environment is present, I am focusing my study on those who are currently employed fulltime and have at least five years of work experience.

Please understand your participation in the study is strictly voluntary. The following is a description of what your participation entails, the terms for participating, and a discussion of your rights as a study participant. Please read this information carefully before deciding whether or not you wish to participate.

If you meet the criteria of: 1) are currently employed fulltime; 2) have at least five years of prior work experience, and should decide to participate in the study, you will be asked to complete the following online survey regarding your work-life balance, including, but not limited to, work and life roles and stress factors. Completion of this survey will take approximately 20 to 30 minutes. Please complete the survey alone in a single setting.

Your responses will be kept anonymous and confidential.

There are no direct benefits to you for participating in the study. This is an opportunity for you to give input about how your work-life balance or imbalance affects your self-instrument.

There are no major risks associated with this study.

If you should decide to participate and find you are not interested in completing the survey in its entirety, you have the right to discontinue at any point without being questioned about your decision. You also do not have to answer any of the questions on the survey that you prefer not to answer—simply leave such items blank. Terminating your participation at any time will not put you in jeopardy in any way.

Two reminder emails will be sent to you to complete and return the survey after this initial email initiation—one, you will receive in one week and the other, two days before the survey deadline. Since this email will go out to everyone and anonymity of participation is ensured, I apologize ahead of time for sending you the reminders if you have already completed the survey prior to the deadline.

If the findings of the study are presented to professional audiences or published, no information that identifies you personally will be released. The data will be kept in a secure manner for three (3) years, at which time the data will be destroyed.

If you have any questions regarding the information that I have provided above, please do not hesitate to contact me at the address and phone number provided below. If you have further questions or do not feel I have adequately addressed your concerns, please contact my research supervisor, Dr. David W. Jamieson at david.jamieson@pepperdine.edu or (310) 699-3060. If you have questions about your rights as a research participant, contact Dr. Yuying Tsong, Interim Chairperson of the Institutional Review Board, Pepperdine University, at yuying.tsong@pepperdine.edu.

You are welcome to a brief summary of the study findings in about one (1) year. If you are interested in receiving the summary, please send me an email under separate cover to soumya.naidu@pepperdine.edu.

Thank you for taking the time to read this information, and I hope you decide to complete the survey.

Sincerely,

Soumya Naidu
Candidate, Master of Science in Organization Development
440.241.4365
soumya.naidu@pepperdine.edu

If you would like to receive documentation of your participation in this research and wish to sign an 'Informed Consent' form you may contact the researcher at soumya.naidu@pepperdine.edu or (440) 241-4365

By checking the box below and by completing the survey online, you are acknowledging that you have read and understand what your study participation entails, and are consenting to participate in the study.

I have read the informed consent (above) and agree to participate in this study.

Appendix D

Interview Invitation Email

Dear Sir/Madam,

Thank you for completing the survey regarding 'The Effect of Work-Life Balance on the Self as Instrument'. You were randomly selected from the list of people who expressed an interest in being interviewed—for which I further thank you!

Your participation is strictly voluntary and can be terminated at any time. The interview will be one-on-one with me, either in person or over the phone, and will take approximately 45 to 60 minutes. So that I can best capture your input, I would like to record the interview and have it transcribed. Your responses will be kept anonymous and confidential.

Since the survey you filled out is anonymous, please respond to this email with your Name, Contact Information, and Dates and Times that would be most convenient for you over the next two weeks. If you would rather decline, please email me and let me know.

Should you decide to participate in the interview, attached is the consent form. Please read it closely and contact me with any questions you may have. You may deliver the signed consent form to me at the time of the interview, if conducted in person; or via email, mail, or fax, if conducted over the phone.

I appreciate your consideration and hope you decide to sign up for an interview.

Thank you,
Soumya Naidu

Candidate, Master of Science in Organization Development
440.241.4365
Soumya.Naidu@pepperdine.edu

Appendix E

Interview Consent Form

Informed Consent for Participation in Research Activities

Participant: _____

Principal Investigator: Soumya Naidu

Title of Project: The Effect of Work-Life Balance on the Self as Instrument

1. I _____, agree to participate in the research study being conducted by Soumya Naidu, a student in the Master of Science in Organization Development program at Pepperdine University, Graziadio School of Business and Management, under the direction of Dr. David W. Jamieson.

2. The overall purpose of this study is designed to investigate the effect of Work-Life balance, or lack thereof, on the Self as Instrument among the Masters in Organizational Development (MSOD) community. I understand that this study is conducted using the MSOD listserv email group where the concept of Self as Instrument is understood and perhaps exercised as part of the daily life. As requested by the researcher, to ensure that a more established work-nonwork environment is present, I confirm that am currently employed fulltime and have had at least five years of work experience.

3. My participation will involve a 45 to 60 minute interview, which will be conducted either face-to-face at a convenient location for both me and the researcher, or over the phone. I grant permission for the interview to be tape recorded and transcribed, and to be used only by Soumya Naidu for analysis of interview data. I understand my responses will be kept anonymous and confidential. If the findings of the study are presented to professional audiences or published, no information that identifies me personally will be released. The data will be kept in a secure manner for three (3) years, at which time the data will be destroyed.

4. I understand there are no direct benefits to me for participating in the study. This is an opportunity to give input about the effect of Work-Life balance, or lack thereof, on the Self as Instrument.

5. I understand there are no major risks associated with this study.

6. I understand that I may choose not to participate in this research.

7. I understand that my participation is voluntary and that I may refuse to participate and/or withdraw my consent and discontinue participation in the interview at any time without penalty or loss of benefits to which I am otherwise entitled.

8. I understand that I may request a brief summary of the study findings to be delivered in about one (1) year. If I am interested in receiving the summary, I will send an email request to soumya.naidu@pepperdine.edu.

9. I understand that the researcher, Soumya Naidu, will take all reasonable measures to protect the confidentiality of my records and my identity will not be revealed in any publication that may result from this project. The confidentiality of my records will be maintained in accordance with applicable state and federal laws.

10. I understand that the investigator is willing to answer any inquiries I may have concerning the research herein described and that I may contact the researcher, Soumya Naidu at soumya.naidu@pepperdine.edu or 440.241.4365. I understand that I may contact Dr. David W. Jamieson at david.jamieson@pepperdine.edu or 310.699.3060 if I have other questions or concerns about this research. If I have questions about my rights as a research participant, I understand that I can contact Dr. Yuying Tsong, Interim Chairperson of the Institutional Review Board, Pepperdine University, at yuying.tsong@pepperdine.edu or 310.568.5768.

11. I understand to my satisfaction the information regarding participation in the research project. All my questions have been answered to my satisfaction. I have received a copy of this informed consent form, which I have read and understand. I hereby consent to participate in the research described above.

_____ _____
Participant Signature Date

_____
Participant Name

I have explained and defined in detail the research procedure in which the subject has consented to participate. Having explained this and answered any questions, I am cosigning this form and accepting this person's consent.

_____ _____
Principle Investigator: Soumya Naidu Date

Appendix F

Protecting Human Research Participants Certificate

Certificate of Completion

The National Institutes of Health (NIH) Office of Extramural Research certifies that **Soumya Naidu** successfully completed the NIH Web-based training course "Protecting Human Research Participants".

Date of completion: 10/05/2009

Certification Number: 312470

Appendix G

Survey

Demographics

1. **Gender?**
   - Male
   - Female

2. **Age?**
   - Under 21
   - 21 to 28
   - 29 to 34
   - 35 to 40
   - 41 to 46
   - 47 to 52
   - 53 to 58
   - 59 to 64
   - 65 & Over

3. **Marital Status?**
   - Married
   - Not Married

4. **Family?**
   - I have kids
   - I do not have kids

5. **Please enter the # of years of professional work experience: _____**

6. **Current Work Experience?**
   - Self Employed
   - Employed by an organization

7. **On average, hours worked per week (not hours scheduled to work)?**
   - 20-30 hrs
   - 30-40 hrs
   - 40-50 hrs
   - 50-60 hrs
   - 60 hrs and above

8. **On average, hours spent on nonwork related tasks per week?**
   - 20-30 hrs
   - 30-40 hrs
   - 40-50 hrs
   - 50-60 hrs
   - 60 hrs and above

9. **On average, hours spent on 'self'—physical (yoga, exercise, walks, etc . . .), emotional (journaling, therapy, etc . . .), spiritual (prayer, meditation, etc . . .)?**
    - Less than 2 hrs
    - 2-5 hrs
    - 5-7 hrs
    - 7-10 hrs
    - More than 10 hrs

Work-NonWork Role Strain

Work: refers to your role as an employee (either of an organization, or of a self-owned business).

Nonwork: is any role outside of the workplace that does not yield in monetary payment of your services—such as parenting, friendships, volunteer work, etc . . .

Any question pertaining to 'family' or 'spouse' or 'children' can be substituted for other social interactions (such as with friends and other family members—parents, siblings, etc.) if the participant is unmarried and/or does not have children.

1. **Please rate the following on a 5 point Likert scale from Always to Never):**
    - My Job keeps me away from my family too much
    - I feel I have more to do than I can handle comfortably
    - I have a good balance between my job and my family time
    - I wish I had more time to do things for my family
    - I feel physically drained when I get home from work
    - I feel emotionally drained when I get home from work
    - I feel I have to rush to get everything done each day
    - My time off from work does not match other family members' schedules well
    - I feel I don't have enough time for myself
    - I worry that other people at work think my family interferes with my job
    - I feel more respected than I would if I didn't have a job
    - I worry whether I should work less an spend more time with my children
    - I am a better parent because I am not with my children all day
    - I find enough time for the children
    - I worry about how my kids are when I am working
    - I have as much patience with my children as I would like
    - I am comfortable with the arrangements for my children while I am working

- Making arrangements for my children while I work involves a lot of effort
- I worry that other people feel I should spend more time with my children

Measure of Physical Stress at Work

Please rate how frequently you experience the various stress-related feelings and occurrences at work.

1. **Please rate the following on a 7 point Likert scale from Always to Never):**
    - Being Tired
    - Feeling Depressed
    - Having a good day
    - Being physically exhausted
    - Being emotionally exhausted
    - Being happy
    - Being "wiped out"
    - "Can't take it anymore"
    - Being unhappy
    - Feeling run-down
    - Feeling trapped
    - Feeling worthless
    - Being weary
    - Being troubled
    - Feeling disillusioned and resentful
    - Being weak and susceptible to illness
    - Feeling hopeless
    - Feeling rejected
    - Feeling optimistic
    - Feeling energetic
    - Feeling anxious

2. **Please rate the following on a 4 point scale ranging from 'Most of the time' to 'Never or Little of the time'**
    - I feel sad
    - I feel unhappy
    - I feel good
    - I feel depressed
    - I feel blue
    - I feel cheerful
    - I feel nervous
    - I feel jittery
    - I feel calm
    - I feel fidgety

- I get angry
- I get aggravated
- I get irritated or annoyed

Measure of Physical Stress in a Nonwork Environment

Please rate how frequently you experience the various stress-related feelings and occurrences when not at work—this could be at home, with friends, while volunteering, etc . . .

1. **Please rate the following on a 7 point Likert scale from Always to Never):**
    - Being Tired
    - Feeling Depressed
    - Having a good day
    - Being physically exhausted
    - Being emotionally exhausted
    - Being happy
    - Being "wiped out"
    - "Can't take it anymore"
    - Being unhappy
    - Feeling run-down
    - Feeling trapped
    - Feeling worthless
    - Being weary
    - Being troubled
    - Feeling disillusioned and resentful
    - Being weak and susceptible to illness
    - Feeling hopeless
    - Feeling rejected
    - Feeling optimistic
    - Feeling energetic
    - Feeling anxious

2. **Please rate the following on a 4 point scale ranging from 'Most of the time' to 'Never or Little of the time'**
    - I feel sad
    - I feel unhappy
    - I feel good
    - I feel depressed
    - I feel blue
    - I feel cheerful
    - I feel nervous
    - I feel jittery
    - I feel calm
    - I feel fidgety

- I get angry
- I get aggravated
- I get irritated or annoyed

Roles
Extent to which different roles (both at work and in nonwork settings) are in conflict or are supportive.

1. **Please compare each of the roles provided on the left-hand side of the matrix with each of the roles on the top of the matrix using the following scale:**

2: participation in one activity had a very facilitative or helpful effect on the other
1: participation in one activity had a somewhat facilitative or helpful effect on the other
0: participation in one activity had no effect on the other
-1: participation in one activity had a somewhat harmful/conflicting effect on the other
-2: participation in one activity had a very harmful/conflicting effect on the other
N/A: role does not pertain to me

	Student	Employee	Spouse	Primary Care Giver	Volunteer	Home Maintainer	Friend	Religious Participant	Other
Student									
Employee									
Spouse									
Primary Care Giver									
Volunteer									
Home Maintainer									
Friend									
Religious Participant									
Other									

Feedback

1. Use this space for any comments that you would like to make about the Work-Life Balance or Self as Instrument.

2. Use this space for any comments that you would like to make about the survey.

Appendix H

Interview Questions

Interview Guidelines

Thank you very much for taking time out of your schedule and agreeing to this interview. Before we begin, let's get some of the administrative out of the way:

- To maintain the authenticity of an interview, I only will be asking questions and therefore will not be commenting or dialoging along the way.
- I want to confirm that you have provided the signed consent form prior to this interview.
- As mentioned in the consent form, this interview is being recorded but I want to restate that I will maintain the highest level of confidentiality and anonymity. Raw data will not be included in any part of the shared study, only aggregate data will be reported.
- Lastly, please feel free to ask me to repeat or clarify any question if I've asked it too quickly or if your answer takes you on a tangent and you would like a reminder of the question.

Interview Questions

1. How would you describe the concept of 'Self as Instrument'?
2. How does 'Self as Instrument' manifest itself in your life?
3. How do the demands (and by "demands", I mean cognitive—such as mental stress or pressure) of work affect your personal, and/or social life?
4. How does the time you spend at work (here, I mean the actual hours you spend at your vocation) affect your personal, and/or social life?
5. What are the advantages of your work on yourself, your family, or your social life?
6. What are the disadvantages of your work on yourself, your family, or your social life?
7. How do the demands (i.e.: mental stress, appointments, chores) of home, family, personal, and/or social life affect your work?
8. How does the time you spend on yourself, with family, and/or with friends affect your work?
9. What are the advantages of your personal life (be it family or friends) on your work?
10. What are the disadvantages of your personal life (be it family or friends) on your work?
11. What methods of self-care do you practice?
12. What methods to get yourself quiet and centered do you practice?
13. Is there anything that you would like to add about either your work-life balance or your self-instrument that I might not have addressed?