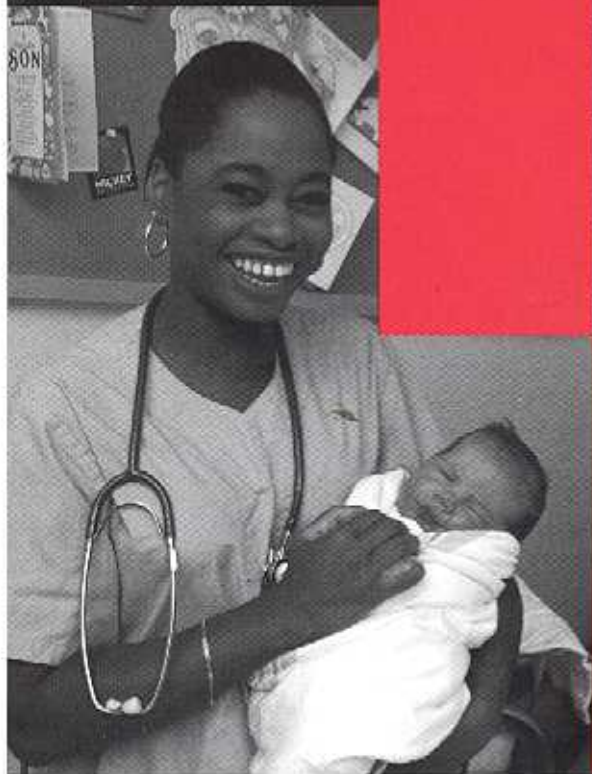
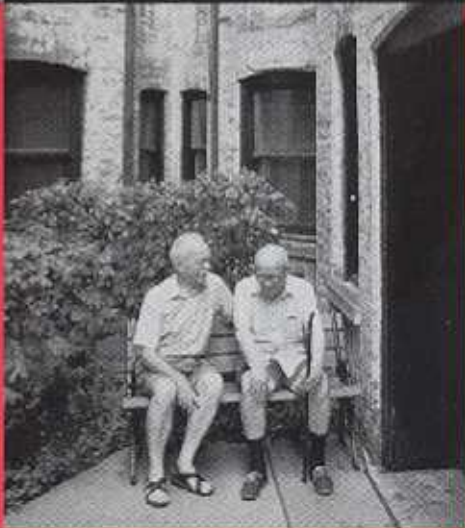
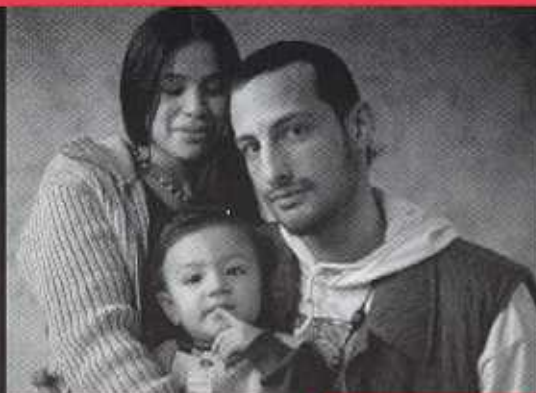


Estimating the Benefits of Paid Family and Medical Leave:

A Colloquium Report

Vicky Lovell, Ph.D.



Institute for Women's
Policy Research

About This Report

The meeting summarized in this report is part of an on-going research project conducted by the Institute for Women's Policy Research that analyzes family and medical leave and other workplace supports that can increase employees' economic well-being. The Institute would like to acknowledge the financial support of the David and Lucile Packard Foundation for this meeting and the Ford Foundation and the Annie E. Casey Foundation for additional support for the meeting and for the larger project.

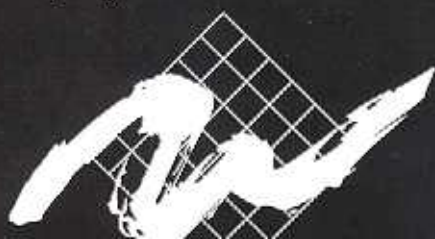
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The Institute for Women's Policy Research (IWPR) is a scientific research organization dedicated to informing and stimulating debate on public policy issues of critical importance to women and their families.

IWPR focuses on issues of poverty and welfare, employment and earnings, work and family issues, the economic and social aspects of health care and safety, and women's civic and political participation.

The Institute works with policymakers, scholars, and public interest groups to design, execute, and disseminate research and to build a network of individuals and organizations that conduct and use women-oriented policy research. IWPR, an independent, nonprofit organization, also works in affiliation with the graduate programs in public policy and women's studies at The George Washington University.

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1707 L Street, NW, Suite 750

Washington, DC 20036

Tel: 202/785-5100

Fax: 202/833-4362

www.iwpr.org

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Introduction

This report summarizes a meeting co-hosted by the Institute for Women's Policy Research and the Institute of Industrial Relations of the University of California Berkeley in March 2002. The purpose of the meeting was to increase the research community's capacity for providing policy-relevant research findings on the benefits that paid family and medical leave policies are likely to provide to workers and their families, employers, and society at large. Participants included advocates for expanded paid leave policies and key researchers with expertise in economics, education, history, law, political science, public administration, public policy, social work, social psychology, and sociology.

The meeting agenda, list of participants, participants' biographical sketches, and partial table of contents of the meeting's resource notebook are provided in Appendices A through D.

The Policy Context for Research on the Benefits of Paid Family and Medical Leave

Demographic, economic, and public policy changes over the last several decades have substantially increased Americans' labor force participation. Sixty-seven percent of all adults are now in the labor force: 75 percent of men and 60 percent of women (US DOC 2002, Table 569). This leaves significantly fewer non-employment hours to care for infants and children, the frail elderly, and the sick than in previous decades. For instance, only 29 percent of school-age children live with a parent who is not in the labor force (US DHHS 2000). However, few changes have been made in the way jobs are organized to address the needs of a society with fewer full-time caregivers at home.

Federal and state policymakers and other advocates for better work/family balance are exploring policy options for filling this caregiving gap. One policy proposal to make it easier for caregivers to perform their responsibilities, both on and off the job, is to increase workers' access to paid time off to care for their families. This proposal follows the success in earlier decades of efforts to address other issues related to the integration of women, and particularly mothers, into the labor force, such as the Equal Pay Act of 1963, Title VII of the Civil Rights Act of 1964, Executive Orders 11246 and 11375, the Pregnancy Discrimination Act of 1978, state family leave acts passed in the 1980s and 1990s, and the federal Family and Medical Leave Act of 1993.

The Family and Medical Leave Act of 1993 (FMLA) created an extremely important new employment right: the right to take up to 12 weeks of leave from work annually in order to recuperate from a serious medical condition, to welcome a newborn, newly adopted, or newly placed foster child, or to care for an immediate family member with a serious medical condition—and then to return to the same, or an equivalent, job with the same employer. During FMLA leave, an employee's health insurance benefits must be continued on the same terms that would have prevailed were no leave taken. While the FMLA's limited coverage leaves millions of workers unprotected, the Act is a powerful public acknowledgement of society's interest in allowing workers the time they need to maintain their own health, as well as that of members of their families.¹

¹ Only individuals who worked for their current employer for at least 12 months before the leave, who worked for that employer for at least 1,250 hours during the previous 12 months, and whose employer has at least 50 employees working within 75 miles of the individual's workplace (or who works for a public agency) are eligible for FMLA leave. In addition, employers may be exempt from reinstating certain "key employees" after their leave is over. Sixty-two percent of workers meet the work experience and workplace size eligibility criteria (Cantor et al. 2001, Table A2-3.1).

Most workers who use FMLA leave (66 percent) receive at least some pay during their leave, through their employers' paid sick, vacation, personal, or parental leave, temporary disability insurance (TDI), or other benefits (Cantor et al. 2001, Table 4.4). However, millions of workers need to take FMLA but cannot afford to do so, and millions more find it very difficult to meet their financial obligations during leaves when they do not receive full pay. For these workers and their families, FMLA leave will only become a functional employment right when an income component is added to the leave's job-protection provisions.

Advocates for the policy eventually enacted as the FMLA were aware of the importance of paid leave and of the difficulty many workers would face in trying to take needed leave if it were unpaid (Littleton 1991). In the 1980s, however, with strong opposition to any kind of leave mandate (President G.H.W. Bush vetoed FMLA twice), and with the job protection component seen as a critical employment benefit (Shiu 1989), advocates and policymakers pushed for unpaid leave as the first step toward a comprehensive leave policy (McManis 1999). After 1993, with unpaid leave provided for many workers by the FMLA, coalitions in several states began campaigns for paid family and medical leave. These efforts were given added impetus in 1998 when the International Labour Organisation released a report showing that the U.S. was one of only three industrialized countries that did not provide paid maternity leave (ILO 1998).² Further encouragement was provided in 1999 when President Clinton, responding to a U.S. Department of Labor (DOL) pronouncement that unemployment insurance could not be used to provide paid leave to new parents in Vermont, directed the DOL to issue regulations that would allow states to choose precisely that use for their unemployment insurance programs (popularly known as "Baby UI").³

Other financing mechanisms have been explored, partly because of uncertainty about the viability of Baby UI created by the lack of support from the current Bush Administration and a lawsuit filed to prevent the implementation of Baby UI, and as advocates search for policy proposals that cover more leave conditions and that mesh with their individual states' political and fiscal environments. Advocates in states that have mandatory temporary disability insurance programs have considered expanding those plans to cover family leave, as well as workers' own non-work-related health needs. Programs that would fund paid family and medical leave through employer payroll taxes and/or state tax revenues have been proposed in some states (National Partnership for Women and Families 2001a).

In September 2002, California Governor Davis signed the country's first state paid family and medical leave law. This new policy expands California's State Disability Insurance program, paying 55 percent of a worker's wages (to a maximum of \$728 a week) for up to six weeks following the birth, adoption, or foster care placement of a child or to care for a sick or injured relative.⁴ At least 25 other states had considered some form of paid family and medical leave by the end of the 2001 legislative sessions (National Partnership for Women and Families 2001b).

² Australia and New Zealand were the other anomalies. A new paid maternity leave policy went into effect in New Zealand in July 2002, leaving Australia and the U.S. as the only outliers.

³ In December 2002, the Department of Labor announced its intention to rescind the Baby UI regulations.

⁴ The program covers caregiving for children, spouses, parents, and domestic partners. The maximum benefit is scheduled to increase in 2005 to \$840, with adjustments in subsequent years according to an index. The program, funded by employer payroll deductions, is effective in January 2004, with the first benefits payable in July 2004.

Purpose of the Meeting

Researchers and advocates for paid family and medical leave have suggested that estimating the value of the benefits of paid leave might be persuasive to some policymakers who are being asked to consider these proposals. While estimates of the costs of some of the proposed programs are available (see, e.g., Albelda and Manuel 2000, CA EDD 2000, Dube and Kaplan 2002, Fiscal Policy Institute 1999, Naples and Frank 2002, US DOL 2000, Vroman 2001), less attention has been paid to identifying and measuring the potential benefits of paid leave policies.⁵

Given the potential importance of estimating the benefits of paid leave, the Institute for Women's Policy Research and the Institute of Industrial Relations of the University of California Berkeley co-hosted a colloquium on paid leave. The meeting was supported by Marie Young of the David and Lucile Packard Foundation, with additional funding from the Ford and Annie E. Casey Foundations. The general purpose of the meeting was to enhance the research community's ability to provide benefit estimates of paid family and medical leave to policymakers and advocates in the states. More specifically, the objectives were to:

- understand advocates' needs for usable, timely, and credible estimates of the benefits of paid family and medical leave;
- identify and discuss potential benefits of paid family and medical leave policies;
- assess the availability of research findings regarding the benefits of paid family and medical leave policies; and
- identify appropriate methodologies for estimating the benefits of paid family and medical leave.

Invited participants included key advocates and researchers with experience in the issue of family and medical leave, as well as other representatives of the academic community with relevant substantive expertise. The meeting was held on March 15, 2002, at the University of California Berkeley campus. This document summarizes the participants' discussions.

⁵ Dube and Kaplan (2002) estimate the savings to employers and TANF and food stamp programs for paid leave in California. Spalter-Roth and Hartmann (1990) analyze the benefits of (costs of not having) a national family and medical leave policy.

The Political Process of Enacting Paid Family and Medical Leave

Information about the likely benefits of paid family and medical leave (PFML) may be a useful tool for advocates, policymakers, and business leaders working to expand access to paid family and medical leave. However, there are several contextual factors that affect the relevance of benefit estimations. In addition, the manner in which economic analyses such as benefit estimations are presented affects their usefulness to interested stakeholders.

Policymakers' Concerns in Considering Paid Family and Medical Leave Proposals

Policymakers tend to be very concerned about the cost of PFML proposals, regardless of the funding mechanism (employer or employee payroll tax and/or general tax revenues). The likely impact on businesses, and particularly on small businesses, is a primary interest. While accurate cost estimations showing a relatively small effect may be most persuasive, larger estimates that suggest the policy would not be devastating to the business community may also be constructive. However, cost is not the only issue for the business community and policymakers. Even if PFML were funded solely through general tax revenues or employee payroll taxes, businesses would still be affected by employees' utilization of paid leave, if the availability of pay during leave increases the number of users or the length of leave taken. Discussion of the likely benefits that would accrue from the enactment of PFML may help mitigate this concern for policymakers, especially when benefits would be experienced directly by employers (for example, in the form of reduced turnover).

Diverse Viewpoints

The business community includes diverse interests. In addition to different impacts likely to be felt by employers of different sizes, individual managers within a single company may have different views of PFML related to their specific role in the organization. Advocates may be able to form constructive partnerships with some members of the business community. (Since many businesses are already required to comply with the FMLA, using language for PFML that is the same as that used in the FMLA may reduce employers' administrative costs and increase support for paid leave policies.)

Public Health/School Readiness

It is important to discuss the potential public health impact of PFML, where specific effects can be identified. For instance, there might be an improvement in children's health status, a decreased use of nursing home facilities, or a reduction in public funding for medical expenses if employees were better able to care for their families because of the enactment of PFML. The effect on children's readiness for school could also be an important issue.

Safety Net

For some policymakers, it may be important to focus on the impact of PFML on low-wage workers and those moving from welfare to work. Implementing PFML could be seen as a way of reinforcing the social safety net that was dramatically changed with welfare reform in 1996, when the expectation that families would support themselves through paid employment was expanded. Some policymakers may now see a need to implement benefits such as paid leave in order to support this increased labor force participation.

U.S./Europe Comparison

Some meeting participants wondered if comparisons with paid leave policies in Europe might be persuasive to policymakers. One idea was to list countries (including the U.S.) by their leave policies and their productivity, to show the relationship between national caregiving policies and countries' economic health. However, policies in other countries are typically for parental leave only, not for broader family and medical leave, and in many instances are restricted to maternity leave (Evans 2000). In the U.S., the coalition working for the FMLA made a strategic decision early on that its goal was to require leave for all caregiving—not just for mothers with new babies, but for other caregivers and other care receivers as well (Greenhouse 1987).⁶ A comparison to other countries that have narrower leave policies would be less relevant to the U.S. policymaking context.

The Role of Public Opinion in Winning Paid Family and Medical Leave

Taking a longer-range view, educating the public about the benefits of PFML may help build a foundation for future legislative action and conversations with policymakers. This outreach could be undertaken as part of a campaign to mobilize voters, which has been shown to be effective in changing public opinion (Brady and Elms 2002).

How to Present Benefit Estimation Data

Researchers should plan strategically about how to present information about PFML benefits to advocates. To be most useful in conversations with policymakers, estimates should be presented in a clear and accessible format and not be overly long or excessively detailed. Advocacy coalitions around PFML may be quite broad, with representatives of labor unions, women's organizations, pediatricians, religious organizations, legal services staff, and advocates for children, the disabled, and the elderly. Individuals using cost or benefit data in PFML campaigns may have little or no experience in understanding or explaining cost/benefit methodology. The method used to construct the estimates should also be described in a manner that is easy to understand, although in many instances the audience for the benefit estimates does not need to know every detail or step in producing the results.⁷

Connecting Advocates and Researchers

Building relationships between advocates and the local research community can be important for PFML advocacy campaigns. These researchers may already have established reputations and credibility with local policymakers. However, it can be difficult for advocates to find researchers who are interested in undertaking the work of producing cost or benefit estimations for local PFML proposals, especially because the goals and timeframes for academic research are not typically congruent with those of public policy campaigns.

⁶ This commitment was generated by feminist concerns about reifying women's role as caregivers, by an understanding of the broader need for leave for purposes other than maternity and paternity, and by an interest in building a foundation for a more inclusive advocacy coalition.

⁷ See Watkins (2001) for an advocate's account of the use of cost estimates in policy campaigns.

Identifying the Benefits of Paid Family and Medical Leave

Meeting attendees brainstormed about the potential benefits of paid family and medical leave policies, identifying many likely benefits for employers, workers and their families, and society (taxpayers). Most of the ideas summarized in this section are speculative, as very little empirical evidence is available about the differential impact of unpaid and paid job-guaranteed leave. Further study may show that several of these benefits are associated more with the former and are not specifically enhanced by the addition of an income replacement component to, for example, FMLA leave. While the group generally assumed that workers would take more frequent and longer leaves if the leaves were paid—a notion supported by data from Cantor et al. (2001) regarding leaves being cut short or not taken because of financial constraints—there is little collaborating evidence of this outcome in existing data.

PFML can provide benefits above and beyond those of unpaid leave if:

- workers receive greater wage replacement during PFML than they would during FMLA leave (which may be compensated by voluntary employer paid leave programs) in the absence of a public program;
- PFML leave is longer than unpaid FMLA leave;
- the availability of PFML increases workers' productivity or job retention;
- PFML is taken when unpaid leave wouldn't be;
- employees with paid leave are more likely to retain employment when they experience a need for leave (for instance, because the wage replacement dissuades them from quitting their jobs and applying for public assistance, or if they avoid work-attendance problems related to their need for leave that would otherwise cause job loss and receipt of unemployment insurance benefits); and/or
- the availability of PFML affects other decisions (for example, families' plans for providing elder-care, or individuals' decisions to join, or remain in, the labor force).

All these outcomes will be affected by the level of compensation provided through a PFML policy. It is unlikely that public PFML policies will provide full wage replacement, though many employers offer full payment for some types of leave or for some portion of leaves.

More data are also needed regarding the current extent of coverage of FMLA leave by employers' voluntary paid leave programs, such as paid sick and vacation leave. The specific details of a PFML policy in terms of the extent of workforce coverage will also affect the nature and magnitude of its benefits.

In addition, as several participants noted, demographic, cultural, and economic differences among employees will affect the way they use PFML. For example, while having PFML might allow some workers' aged parents to continue to live independently rather than moving into a care facility—because their employed adult children could take time when needed to care for them—seniors with fewer economic resources would not have the option of using a care facility whether or not their adult employed children could help them during medical crises, so having PFML would not prevent a relocation into a care facility. In some cultural communities, moving an elderly family member into a care facility, rather than having the family provide care, would not be acceptable even if it were affordable.

Finally, although these benefits have been categorized here for ease of presentation, some of them may affect more than one group. Many of the intangible benefits for society would also have a positive effect of providing a stable workforce for businesses and healthier families for workers, for example.

Benefits for Employers

Several areas in which PFML might benefit employers were discussed, including direct cost savings or revenue increases, savings associated with decreased unplanned absences, increased productivity, and savings related to workforce development.

- Direct cost savings or revenue increase: Lower out-of-pocket expenditures for benefits such as child-care subsidies, medical care, and workers' compensation claims; higher revenue through retention of clients who would take their business elsewhere if affected employees left the firm; potential savings from avoiding lawsuits over inequitable access to family leave time.
- Cost savings that would accrue from being better able to plan around absences: Uncertainty regarding staffing is costly to firms; a recent survey found that the average annual per-employee cost of unscheduled absenteeism is \$600 (CCH Incorporated 2000). If the availability of PFML allowed workers and managers to better schedule around needed time off, employers might reap cost savings.
- Increased productivity: PFML might increase productivity through a number of mechanisms:
 - Creating better morale, improving health and restedness, increasing loyalty to an employer who expresses concern about and support of employees' family responsibilities, decreasing error rates of employees who need and can utilize time off. Team morale may also benefit if individual employees experience less work/family conflict, which is especially important to employers who utilize work groups.
 - Enhanced morale may increase creativity and innovation, qualities that are increasingly essential to firms competing in a global economy (Reichheld 1996).
 - The availability of PFML may lower turnover by allowing workers to retain their jobs during periods of family caregiving.
 - PFML may increase productivity by reducing depression (the relationship between depression and productivity has been analyzed by Berndt and Finkelstein 1998), if the inability to adequately address family care needs is associated with depression and would be alleviated by PFML.
- Savings and increased productivity from workforce development: Reduced gender bias, greater advancement opportunities for female caregivers; increased labor supply of caregivers; better long-term career and intellectual capital development with better support for work/family accommodation.

It is likely that these benefits would vary by size of firm.

Benefits for Workers and Their Families

Workers and their families are likely to experience a reasonable benefit from PFML primarily in the form of increased income during leave. They may also have lower costs for third-party care for family members, greater long-term economic security, and intangible benefits.

- Direct increase in income or decrease in spending: Wage replacement during otherwise unpaid leave increases income; keeping elderly and disabled relatives at home rather than in a care facility or purchasing less infant care, which is expensive and inadequately supplied, decreases expen-

ditures. If mothers are better able to establish and maintain breastfeeding when they have PFML, the paid leave may support short- and long-term health benefits of breastfeeding; and paid leave may allow workers to avoid costs associated with inadequate medical and mental health recovery from childbirth. There may be additional savings from decreased incidence of elder abuse and other violence (including workplace violence) and from avoiding negative impacts of poor infant care.

- Having PFML available may have a long-term impact on families' financial stability, as it allows them to avoid drawing down financial resources and increases their ability to maintain financial obligations such as mortgage payments.
- Intangibles: Caregivers may feel less work/family conflict; may experience less stress if they are not forced to return to work when they feel affordable, quality newborn care is not available; may benefit from being able to ensure continuity of care to family members; may value knowing that PFML benefits will be available in case of future need ("option value" is a good that individuals might be willing to pay for even if they never need to use the PFML); and may experience greater family stability through avoiding financial strain. Siblings may benefit by not having to provide care, when parents can take leave.

Benefits will vary among employees, depending on the presence of other potential caregivers in their social system, their financial resources (which affect how they deal with unpaid leave), whether their needs for caregiving leave are critical or chronic, and their values about how care should be provided to their family.

Benefits for Society and Taxpayers

Paid leave may save taxpayers money by decreasing transfer payments to workers who become unemployed when they need caregiving leave and by reducing health-care expenditures. In addition, meeting participants suggested a number of intangible benefits to society of providing better support to families.

- Direct cost savings: Lower transfer payments (welfare, unemployment insurance, Medicaid) with fewer job quits; reduced catastrophic health expenditures. If family care speeds recovery, paid leave may further reduce health-care expenditures and spending on care facilities. Additional cost savings may result if access to PFML affects the incidence of low-birthweight babies.
- Intangibles: Providing wage replacement during FMLA leave may provide a consumption smoothing effect, as employees on leave are more able to maintain their usual level of consumer spending (an impact that has been established for unemployment insurance, Gruber 1997). This increases revenue for businesses patronized by workers who are on leave. Society may also accrue benefits from demonstrating to children that their well-being is important and valued, even in comparison with their parents' employment. Supporting caregiving and parenting by offering PFML could increase fertility or, if it induces men to increase their participation in caregiving, equalize women's and men's employment experiences and outcomes. Public leave policies should increase the equity of access to paid time off, as research shows that low-wage workers are currently less likely to be covered by paid leave than are those with higher wages (Heymann 2000). Finally, if PFML leads to better care of children, it may provide long-term benefits related to children's improved cognitive and socio-emotional development and better basic health and safety.

Developing Models to Estimate the Benefits of Paid Family and Medical Leave

Working under a contract with the Institute for Women's Policy Research funded by the Ford Foundation, Randy Albelda and Alan Clayton-Matthews of the University of Massachusetts Boston and Tiffany Manuel of the University of North Carolina Charlotte are developing a cost estimation model to use in valuing the benefits of PFML proposals. The project's goal is to quantify two primary components of PFML benefits: the long-term impact of job loss on wages (for workers who, in the absence of paid leave, lose their jobs) and amounts of transfer income such as unemployment insurance, public assistance, and Medicaid received by these workers.

The benefit estimation model uses leave data from Cantor et al. (2001) and demographic and employment data from the National Longitudinal Survey of Youth to calculate the impact of a leave-needing event on individual employment outcomes. The model can be modified to reflect the configuration of a variety of PFML proposals, including Baby UI and expanded TDI.

Arindrajit Dube and Ethan Kaplan worked with Michael Reich to provide cost and benefit estimates of expansion of California's TDI program to cover family and medical leave. Dube and Kaplan (2002) use data from the U.S. Department of Labor's *Balancing the Needs of Families and Employers* survey (Cantor et al. 2001) and Small Business Administration survey data on employee turnover and replacement costs (Trzcinski and Alpert 1990) to estimate employers' savings from paid family and medical leave. They also estimate the impact of paid leave in reducing government payments for TANF and food stamps. The 2001-2002 California Workplace Survey, sponsored by the University of California Berkeley's Institute for Labor and Employment, found that 79 percent of Californians support paid family leave and that 65 percent would be willing to pay at least \$2 per month to have PFML themselves.

Methodological Issues Related to Evaluating the Benefits of Paid Family and Medical Leave

Researchers must be wary of using individuals' past behavior to predict the likely effects of a new policy, especially if widespread change in benefit availability leads to the evolution of new cultural norms about caregiving and leave-taking. The availability of an enhanced leave benefit could induce behavioral change that would not be predicted by analysis of individuals' behavior in a different policy environment.

Another way of getting estimation data is to compare the behavior of individuals who have different benefits (e.g., those living in states with temporary disability insurance mandates with those in other states), or to use data on benefit utilization from before and after implementation of, or a substantial change in, a benefit program. In some instances, a control group can be identified that is unlikely to be affected by a benefit policy (or that is expected to experience only a small effect), for comparison to the group of interest or to verify that a model has been specified accurately. For instance, in Christopher Ruhm's analysis of the effect of parental leave on child mortality rates, the relationship between parental leave and elders' mortality is used to assess the model that is then employed to evaluate the impact of parental leave on children's health (2001).

One method for valuing paid family and medical leave, or to measure the importance of PFML to voters, is contingent valuation, or "willingness-to-pay" research. In this approach, survey respondents are asked to specify what amount they anticipate they would be willing to pay in order to have a particular public policy. The value may accrue through respondents' expectation that they would use the benefit themselves (use value) or because of an altruistic sense that the value should be available to others even though the respondent does not anticipate using it (non-use or "need" value). A recent contingent valuation study found that a sample of urban elementary school teachers was willing to pay a weekly premium of \$6.73 for one annual week of family care leave (Drago, Costanza, and Caplan 2001).

While this methodology can produce useful information regarding the importance of PFML to the public, some participants in the meeting expressed the view that it is a better political tool than a research method, especially since contingent valuation estimates are highly sensitive to word choice and question order. Others felt it is an appropriate means of determining the value of an otherwise difficult to measure benefit.

Existing Research Findings and Data; Data Collection

A number of existing data sets were mentioned that might have relevant data for PFML researchers.

- Surveys with data about paid leave include the U.S. Department of Labor's 1995 and 2000 surveys about the need for and use of family and medical leave (Commission on Family and Medical Leave 1996, Cantor et al. 2001), the Bureau of Labor Statistics' Employee Benefits Surveys (www.bls.gov/ncs/ebs/home.htm), and the Families and Work Institute's National Study of the Changing Workforce (www.familiesandwork.org).
- For information about companies' current leave policies and their utilization: The annual surveys of companies with model work/life programs conducted by *Working Mother* magazine; work by Milt Moskowitz, business writer and advocate for corporate social responsibility; and surveys conducted by the Great Place to Work Institute, the results of which are published in *Fortune* magazine as "100 Best Companies to Work For in America."
- Surveys about health practices: the National Health Interview Survey has data on respondents' use of medical services (but has little information about geographic location); the Behavioral Risk Factor Surveillance System, with approximately 150,000 observations annually, collects data regarding health-related practices by state and may have relevant information about such issues as breastfeeding; and the Health and Retirement Survey follows cohorts with extremely detailed health data (though the sample size is small).
- The California Work and Health Survey, a longitudinal survey started in 1998 by the Institute for Health Policy Studies of the University of California San Francisco, reports data related to employment and health.

Participants in the meeting also suggested ways to expand existing surveys or implement new ones to gather additional data about the benefits of paid family and medical leave.

- Utilization data available through state governments: Researchers might work with state labor departments to expand unemployment insurance surveys.
- Employer surveys, asking about turnover and other business impacts. Eileen Trzcinski and William Alpert implemented a four-page written employer survey, asking very detailed questions about leave policies, with a 75 percent response rate (1990). (Michael Reich will survey California employers next year.)
- Where no single dataset contains the data required for a study, researchers may be able to link multiple datasets together. For instance, Henry Brady is working with the U.S. Department of Labor and the California Employment Development Department to link data from the state unemployment insurance surveys with the federal Current Population Survey.
- If the U.S. Department of Labor conducts a third FMLA survey, it might be possible to add questions regarding the length of leaves taken and wage replacement rates offered under employers' existing voluntary paid leave policies.
- The National Institute of Child Health and Development and the National Institute of Aging are undertaking a new inter-generational initiative and are looking for new projects to support.
- It might be possible to identify individuals with certain medical needs (e.g., Alzheimer's patients) and then investigate their caregiving support networks, as a way of estimating the need for paid leave for caregivers for these populations.

Next Steps for the Research Community

Participants identified a number of gaps in current research that hamper efforts to accurately assess the benefits that would likely accrue from the implementation of paid family and medical leave. They also suggested many specific ways to discuss the importance and value of paid leave.

Research Needs

A. Data on leave availability and use

1. Document the extent of present coverage by paid sick, vacation, temporary disability, and family and medical leave programs. In examining this issue, it is important to note that PFML is not a vacation and that workers need all three kinds of leave (vacation, sick, and family and medical). For instance, if new parents return to work with no sick leave balance to draw on when they, or their infants, become ill, inadequate care may be provided after the leave is over. PFML is for serious health conditions, while sick leave is for less serious illness of self and, where allowed, family members.
2. Calculate utilization rates of existing leave and likely utilization rates of proposed PFML by detailed leave reason and employee demographics. (Confidential surveys might be useful here.)
3. Examine differences in experiences/outcomes between states that now have mandatory temporary disability insurance (California, Hawaii, New Jersey, New York, and Rhode Island) and those that do not. (This could be in the form of logistic regression where the dependent variable is the probability of taking a family and medical leave,) controlling for other systematic differences among these two groups of states.
4. Obtain data regarding the number of workers who do not return to work following leave, or are dismissed shortly after a return from a (12-week) leave.

B. Employers' experiences of leave

1. Document the value to employers of improved morale.
2. Perform a solid, credible study of the cost of employee turnover (possibly updating the study reported in Phillips 1990). It would be useful to have a cost model that captures the impact of turnover on a firm's reserve of intellectual capital and on shareholder value and that also recognizes that some turnover may be perceived by employers to be a positive business factor.
3. Study the experiences of companies with model PFML policies.

C. Caregivers and caregiving

1. Using hospital records, track the number of individuals needing care and the number of caregivers per care need incident.
2. Use simulation studies to assess the impact of access to PFML on elder-care planning.
3. Explore the relationship between leave-taking and human capital accumulation: Does more leave-taking increase labor force tenure and thus human capital, or does more leave-taking interrupt human capital development?
4. Explore whether family care is better than paid care, in terms of speed of recovery and long-term complications.

5. Explore how families cope with the lack of paid leave now and how these coping strategies vary among different groups of workers.

D. Other

1. Conduct more research on how information about PFML affects public opinion.

Strategies for Evaluating and Presenting Benefit Estimations

A. Defining research projects

1. Focus on a small number of benefits that have the largest impact, rather than trying to capture the entire universe of likely benefits. For example, with an expanding elder and chronically ill population, costs associated with their caregiving needs and questions about who will provide that care may have an especially large economic impact. (MetLife of Massachusetts may have documentation of the relationship between caregiving and nursing home costs.)

B Building coalitions

1. Coordinate the influence of institutional investors and Boards of Directors to build their support for voluntary employer paid leave policies. It might be useful to survey Boards of Directors about corporate workforce quality issues and leave policies, to increase their awareness and concern about the need for PFML.

C. Framing the issues

1. Discuss the business community's need for a "family infrastructure" as well as the typical infrastructure needs provided by public works such as roads and public utilities.
2. Talk about the costs of PFML as being a cost-shifting, rather than the imposition of new costs. Thus, a worker who cannot take a long enough leave to fully recuperate from a medical crisis bears a cost in returning to work too early. The income benefit this worker would receive through PFML is not a new cost; it is a shift in who is assigned responsibility for paying the cost.
3. Encourage businesses to take a long-term view of employees' caregiving needs; show that they're paying the costs now of not providing adequate support, although they may not be aware of it.
4. Even if some intangibles are difficult to quantify, such as the value of externalities like altruism, they can still be presented as important components in a discussion of PFML policies.
5. Re-evaluate arguments made by those opposed to PFML, to identify and understand arguments that have not been evaluated thoroughly. For instance, it might be helpful to study the possible abuse/overuse of PFML, to suggest ways policies and businesses can minimize that problem, if it exists. (However, research suggests that workers do not seek out caregiving activities—see Hochschild 1997—so this may not be a relevant factor.)

D. Other

1. Analyze which businesses currently do and do not provide paid leave benefits to see if collectivizing PFML would reduce costs for some employers.
2. Presenting data that ranks the states in extent of leave coverage can be useful, showing which are doing a better job of supporting working families.

Conclusion

Articulating the benefits of paid family and medical leave policies is very important in working to enact these policies. Discussions or estimates of the benefits of leave programs help build support among diverse communities and pose a counterbalance to calculations of program costs. Several surveys are available that contain relevant data about the likely benefits of paid leave policies, but existing datasets are inadequate for many of the estimation procedures that are needed. Many critical research questions, therefore, remain unanswered. Several research efforts currently underway, however, promise to significantly advance understanding of the potential financial benefits of paid leave.

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Appendix A

Colloquium on the Benefits of Paid Family and Medical Leave

Co-hosted by the Institute for Women's Policy Research and the Institute of Industrial Relations, University of California Berkeley, March 15, 2002

AGENDA

Meeting objectives

- Discuss advocates' needs for useable, timely, and credible estimates of the benefits of paid family and medical leave
- Assess the availability of research findings regarding the benefits of paid family and medical leave policies
- Identify appropriate methodologies for estimating the benefits of paid family and medical leave

Meeting schedule

- 8:30 am Continental breakfast
- 9:00 am Welcome and introductions
Heidi Hartmann and Barbara Gault, Institute for Women's Policy Research
Michael Reich, Institute of Industrial Relations, University of California Berkeley
Marie Young, David and Lucile Packard Foundation
- Meeting participants*
- 9:20 am Background, meeting objectives, agenda review
Vicky Lovell, Institute for Women's Policy Research
- 9:30 am Discussion: What advocates for paid leave need to demonstrate the benefits of new policies
Netsy Firestein, Labor Project for Working Families
Marilyn Watkins, Economic Opportunity Institute
- 10:15 am Break
- 10:30 am Discussion/brainstorming session: Identifying the benefits of paid leave
Vicky Lovell, Institute for Women's Policy Research
- 11:30 am Developing an econometric model to estimate the benefits of paid leave
Randy Albelda, University of Massachusetts Boston
- 12:30 pm Lunch
- 1:15 pm Discussion: Methodological issues
Heidi Hartmann, Institute for Women's Policy Research
- 2:45 pm Break
- 3:00 pm Discussion: Research findings and data to use in quantifying the benefits of paid leave
Michael Reich, Institute of Industrial Relations, University of California Berkeley
- 4:30 pm Review meeting objectives; summarize strengths and weaknesses of existing research; discuss next steps
Barbara Gault, Institute for Women's Policy Research
- 5:00 pm Adjourn

Appendix B

LIST OF MEETING PARTICIPANTS

Colloquium on Measuring the Benefits of Paid Family and Medical Leave

Randy Albelda, Ph.D.

Professor of Economics
University of Massachusetts, Boston
100 Morrissey Blvd.
Boston, MA 02125
Office (617) 492-1822
Fax (617) 287-6949
randy.albelda@umb.edu

Henry Brady, Ph.D.

Director
UC DATA, Survey Research Center
University of California Berkeley
2538 Channing Way, #5100
Berkeley, CA 94720
Office (510) 642-3008
Fax (510) 643-8292
hbrady@csm.berkeley.edu

Sandra Burud, Ph.D.

Visiting Research Faculty
Peter F. Drucker Graduate School
of Management
Quality of Life Center and School
of Educational Studies
Claremont Graduate University
232 N. Altavista Avenue
Monrovia, CA 91016
Office (626) 256-3423
Fax (626) 359-7863
sandy@burud.org

Kitt Carpenter

University of California Berkeley
433 Perkins St., #302
Oakland, CA 94610
Home (510) 663-3350
kitt@econ.berkeley.edu

Arindrajit Dube

Department of Economics
University of Chicago
115 Porter St. Apt. 1
Somerville, MA 02143
(617) 596-6159
arindube@yahoo.com

Netsy Firestein

Director
Labor Project for Working Families
2521 Channing Way, Number 5555
Berkeley, CA 94720
Office (510) 643-6814
Fax (510) 642-6432
netsyf@uclink.berkeley.edu

Barbara Gault, Ph.D.

Director of Research
Institute for Women's Policy Research
1707 L Street NW, Suite 750
Washington, DC 20036
Office (202) 785-5100
Fax (202) 833-4362
gault@iwpr.org

Heidi Hartmann, Ph.D.

President and CEO
Institute for Women's Policy Research
1707 L Street NW, Suite 750
Washington, DC 20036
Office (202) 785-5100
Fax (202) 833-4362
hartmann@iwpr.org

Pam Haynes

Legislative Advocate
California Labor Federation
1127 11th Street, Suite 425
Sacramento, CA 95814
Office (916) 444-3676 x17
Fax (916) 444-7693
phaynes@calaborfed.org

Ethan Kaplan

Department of Economics
University of California Berkeley
1601 Allston Way
Berkeley, CA 94703
Home (510) 649-7394
ekaplan@econ.Berkeley.edu

Vicky Lovell, Ph.D.

Study Director
Institute for Women's Policy Research
1707 L Street NW, Suite 750
Washington, DC 20036
Office (202) 785-5100
Fax (202) 833-4362
lovell@iwpr.org

Greer McVay

Family Leave Coordinator
Labor Project for Working Families
2521 Channing Way
Berkeley, CA 94720
Office (510) 643-6814
lpwf@uclink.berkeley.edu

James Rebitzer, Ph.D.

Professor of Economics
Weatherhead School of Management
Case Western Reserve University
10900 Euclid Avenue
Cleveland, OH 44106-7206
Office (216) 368-5537
jbr@po.cwru.edu

Michael Reich, Ph.D.

Professor of Economics
Institute of Industrial Relations
University of California Berkeley
2521 Channing, #5555
Berkeley, CA 94720-5555
Office (510) 643-7079
Fax (510) 642-0822
mreich@econ.berkeley.edu

Christopher Ruhm, Ph.D.

Jefferson-Pilot Excellence Professor of
Economics
Department of Economics
444 Bryan Building
University of North Carolina, Greensboro
Greensboro, NC 27402
Office (336) 334-5148
Fax (336) 334-4089
c_ruhm@uncg.edu

Jean Sinzdak

States Outreach Associate
Institute for Women's Policy Research
1707 L Street NW, Suite 750
Washington, DC 20036
Office (202) 785-5100
Fax (202) 833-4362
sinzdak@iwpr.org

Stephen Sugarman, J.D.

Agnes Roddy Robb Professor of Law
School of Law
327 Boalt Hall
University of California Berkeley
Berkeley, CA 94720
Office (510) 642-0130
Fax (510) 642-3856
sugarman@law.berkeley.edu

E. Kay Trimberger, Ph.D.

Professor of Women's & Gender Studies
at Sonoma State University
Affiliated Faculty Member at the
Center for Working Families,
University of California Berkeley
2124 Prince St.
Berkeley, CA 94705
Office (510) 848-4033
ektrim@uclink4.berkeley.edu

Eileen Trzcinski, Ph.D.

Associate Professor, School of Social Work
Wayne State University
School of Social Work
340 Thompson
Detroit, MI 48202
Office (313) 577-4422
Fax (313) 577-8770
e.trzcinski@wayne.edu

Marilyn Watkins, Ph.D.

Economic Security Policy Director
Economic Opportunity Institute
4738 11th Avenue NE
Seattle, WA 98105
Office (206) 529-6370
Fax (206) 633-6665
marilyn@eoionline.org

Marie Young

David and Lucile Packard Foundation
300 Second Street, Suite 200
Los Altos, CA 94022-3643
Office (415) 948-7658
Fax (415) 948-6498
m.young@packfound.org

Appendix C

PARTICIPANTS' BIOGRAPHICAL SKETCHES

Colloquium on Measuring the Benefits of Paid Family and Medical Leave

Randy Albelda, Ph.D.

Professor of Economics

University of Massachusetts Boston

Randy Albelda is a Professor of Economics and Director of the Public Policy Ph.D. Program at the University of Massachusetts Boston. She is the author of *Economics and Feminism: Disturbances in the Field* (Twayne Publishers); co-author of the books *The War on the Poor: A Defense Manual* (The New Press) and *Glass Ceilings and Bottomless Pits: Women's Work, Women's Poverty* (South End Press); and co-editor (with Ann Withorn) of *Lost Ground: Welfare Reform, Poverty and Beyond* (South End Press). She is currently working on a project estimating the costs and benefits of paid family and medical leave.

Henry Brady, Ph.D.

Director

UC DATA, Survey Research Center

University of California Berkeley

Henry E. Brady is Professor of Political Science and Public Policy at the University of California Berkeley. He received doctorates in Political Science and Economics from MIT in 1980. He is co-author of *Expensive Children in Poor Families: The Intersection of Childhood Disabilities and Welfare* (2000) and of "Seasonal Employment Dynamics and Welfare Use in Agricultural and Rural California Counties" in a forthcoming book on *Rural Dimensions of Welfare Reform*. The recent California Policy Research Center Brief "California's Immigrant Households and Public-Assistance Participation in the 1990s" summarizes initial results from his current research on California immigrant households. As Director of the Survey Research Center and UC DATA, two research centers at UC Berkeley, Professor Brady served as principal investigator for the California Work Pays Demonstration Project funded by the California Department of Social Services. Professor Brady has coauthored books on elections and political participation, including *Letting the People Decide: The Dynamics of a Canadian Election and Voice and Equality: Civic Voluntarism in American Politics* (1995). In addition to his books, Professor Brady has written numerous articles on statistical methods and research design, welfare policy, and on politics and policy in Canada, the United States, Russia, and Estonia.

Sandra Burud, Ph.D.

Visiting Research Faculty

Peter F. Drucker Graduate School of Management

Quality of Life Center and School of Educational Studies

Claremont Graduate University

Dr. Burud is full-time Visiting Research Faculty at the Claremont Graduate University at the Center for Educational Studies and the Peter F. Drucker Graduate School of Management Quality of Life Center. She directs a project at the University that will produce a book on the business case for work/life practices. It will include a compendium of research evidence on these measurable contributions that work/life balance practices make to business success as well as tools that allow employers to apply

the information in their own decision-making. Prior to this work, Dr. Burud spent sixteen years consulting with employers on how to use work/life initiatives to further their strategic business goals, including ten years leading the consulting firm Burud & Associates. Burud & Associates also operated six work-site child development centers for California employers, including P.G.& E., the Los Angeles Department of Water and Power, and PacificCare Health Systems, among others. Before creating a consulting practice, Dr. Burud conducted national research on child care benefits and co-authored the first “how to” book for employers on the subject — *Employer Supported Child Care: Investing in Human Resources*. In 1998, Dr. Burud authored the National Trend Study of Work-Site Child Care. She has also authored articles for Personnel Administrator, ACA Journal, and other journals. Dr. Burud holds a Master of Arts Degree in Human Development from Pacific Oaks College and a Ph.D. in Education from Claremont Graduate University.

Kitt Carpenter

University of California Berkeley

Kitt Carpenter is a graduate student of economics at the University of California Berkeley and is currently working with Dr. Michael Reich on issues related to paid family and medical leave.

Arindrajit Dube

Department of Economics

University of Chicago

Arindrajit Dube is a graduate student of economics at the University of Chicago and is currently working with Dr. Michael Reich at the University of California Berkeley on issues around paid family and medical leave.

Netsy Firestein

Director

Labor Project for Working Families

Netsy Firestein is Director and founder of the Labor Project for Working Families, recognized as the leading national organization on unions and work/family issues. She works with unions around the country on negotiating for and developing work and family programs and policies, including child care, eldercare, family leave, and flexible work schedules. She has written numerous articles on child care, labor-management collaborations, and union successes on work and family. The Labor Project also advocates for improved public policies for working families and is currently working on paid family leave legislation in California. Ms. Firestein was previously the director of the District 65-U.A.W. Members Assistance Program in New York City. She has also worked for various union organizations as well as community based groups in New York and California. Ms. Firestein is on the Executive Board of the East Bay chapter of the Coalition of Labor Union Women and the Advisory Board of the Labor Center for Research and Education at the University of California Berkeley. She is a member of the Service Employees International Union Local 535.

Barbara Gault, Ph.D.

Director of Research

Institute for Women’s Policy Research

Barbara Gault is the Director of Research at the Institute for Women’s Policy Research. Dr. Gault received her Ph.D. in social psychology from the University of Pennsylvania in 1997 and her B.A. from the University of Michigan, also in psychology. Dr. Gault has authored articles on women, job train-

ing and welfare reform, and on women's political participation. Prior to joining IWPR, Dr. Gault was a Research Associate at the Office of Children's Health Policy Research in Pennsylvania, focusing on state health service delivery systems.

Heidi Hartmann, Ph.D.

President and CEO

Institute for Women's Policy Research

Dr. Heidi Hartmann founded IWPR in 1987 to meet the need for women-centered, policy-oriented research. She holds a B.A. in Economics from Swarthmore College and M.Phil and Ph.D. degrees in Economics from Yale University. In 1994, she received a MacArthur fellowship award. Commonly referred to as the "genius grant," this fellowship was awarded to recognize her pioneering work in the field of women and economics. At IWPR, Dr. Hartmann has co-authored several reports including *Unnecessary Losses: Costs to Americans of the Lack of Family and Medical Leave*; *Who Needs a Family Wage?: The Implications of Low-Wage Work for Family Well-Being*; *Women's Access to Health Insurance*; *Combining Work and Welfare: An Alternative Anti-Poverty Strategy* and *The Impact of Social Security Reform on Women*. Before founding IWPR, she taught at Rutgers University and the New School for Social Research and worked at the National Academy of Sciences and the US Commission on Civil Rights. Dr. Hartmann is originally from Toms River, New Jersey.

Pam Haynes

Legislative Advocate

California Labor Federation

Pam Haynes currently serves as legislative advocate for the California Labor Federation, AFL-CIO. Prior to her association with the California Labor Federation, Ms. Haynes served as the Program Director for Sacramento START (*Students Today Achieving Results for Tomorrow*), a program to build the capacity of children to succeed both academically and socially. From 1996 to 1998, Ms. Haynes was chief-of-staff to state Senator Deborah Ortiz. Her legislative responsibilities included education, labor, human and social services and welfare-to-work. In addition, she also operated her own business — PMH & Company, a consulting practice. Ms. Haynes currently serves as Trustee to the Los Rios Community College District. Ms. Haynes received her Bachelor of Arts degree in Political Science and History from the University of California, Los Angeles and a Master's degree in Public Administration from Harvard University.

Ethan Kaplan

Department of Economics

University of California Berkeley

Ethan Kaplan is a graduate student of economics at the University of California Berkeley and is currently working with Dr. Michael Reich on issues related to paid family and medical leave.

Vicky Lovell, Ph.D.

Study Director

Institute for Women's Policy Research

Vicky Lovell is a Study Director at the Institute for Women's Policy Research. She has a Ph.D. in public policy from Portland State University, with concentrations in labor economics and the public policy process, and a B.A. in liberal arts from Pomona College. Her work focuses on issues related to

women's employment and economic security, including pay equity, employment discrimination, family and medical leave, and unemployment insurance. Dr. Lovell directs a project that is creating an econometric model to estimate the costs and benefits of paid family and medical leave and another that examines barriers women and low-wage workers face in accessing unemployment insurance benefits. She is also conducting research to identify factors that cause the gender wage ratio to vary among the states.

Greer McVay

Family Leave Coordinator

Labor Project for Working Families

Greer McVay joined the staff at the Labor Project For Working Families (LPWF) in 2002. Her responsibilities include coordinating a statewide coalition in support of Paid Family Leave, participating in policy and legislative matters, and maintaining relationships with the press, government, and national, state and local social service agencies. Prior to joining LPWF, Ms. McVay spent over ten years in public relations and community affairs. She also developed arts education programs for the Alley Theatre in Houston, TX. As the Coalition Coordinator at LPWF, Ms. McVay spends most of her days developing relationships with organizations that support Paid Leave legislation (SB 1661, Kuehl), by speaking at conferences throughout California.

James Rebitzer, Ph.D.

Professor of Economics

Weatherhead School of Management

Case Western Reserve University

James Rebitzer's research concerns the relationship between human resource systems and economic outcomes. He teaches classes at the undergraduate and graduate level in the economics of labor markets and organizations. Dr. Rebitzer received his Ph.D in economics from the University of Massachusetts at Amherst in 1985. He was on the faculty of the University of Texas at Austin economics department from 1985-1988. From 1989-1997, Dr. Rebitzer was on the faculty of MIT's Sloan School of Management. He is currently the Carlton professor of economics and chair of the economics department at Case Western Reserve University. In addition, Rebitzer is a Research Associate at the National Bureau of Economic Research and a member of the editorial board of the *American Economic Review*.

Michael Reich, Ph.D.

Professor of Economics

Institute of Industrial Relations

University of California Berkeley

Michael Reich is Professor of Economics at the University of California at Berkeley and Research Director of the Institute for Labor and Employment at the University of California. He has also served as Research Director of the National Center for the Workplace and editor of the journal *Industrial Relations*. Reich obtained his Ph.D. from Harvard in 1974 and is the author of numerous books and articles, including *Segmented Work, Divided Workers* (1982), *Social Structures of Accumulation* (1994), and *Work and Pay in the United States and Japan* (1997). His recent research has centered on the economic impacts of mandated wage and workplace standards, including pension and training mandates, prevailing wages, minimum wages and living wages.

Christopher Ruhm, Ph.D.

Jefferson-Pilot Excellence Professor of Economics

Department of Economics

University of North Carolina, Greensboro

Christopher J. Ruhm earned a Ph.D. in Economics from the University of California at Berkeley in 1984. He has served on the faculty at the University of North Carolina at Greensboro since 1991 and is also a Research Associate at the National Bureau of Economic Research and a Research Fellow at the Employee Benefits Research Institute. During the 1996-97 Academic year he served as Senior Economist on the President's Council of Economic Advisers. Prior to joining the UNCG faculty, he taught at Boston University and held a Postdoctoral Research Fellowship at Brandeis University. Professor Ruhm teaches in the areas of health economics, labor economics, applied microeconomics, and quantitative methods and has conducted extensive research on the determinants of health and risky behaviors, impact of parental leave policies and mandated employment benefits, causes and effects of job displacements, transition into retirement, and the economic consequences of alcohol and illegal drug policies. He is co-author of *Turbulence in the American Workplace* (published by Oxford University Press in 1990) and has written more than 40 articles or book chapters.

Jean Sinzduk

States Outreach Associate

Institute for Women's Policy Research

Jean Sinzduk received a Master of Social Work, specializing in social and economic development, from the University of Pennsylvania in Philadelphia in 1999 and a B.A. in English from the University of Scranton. While in Philadelphia, Ms. Sinzduk worked at the University of Pennsylvania Women's Center, where she researched and organized campaigns around various social issues, including welfare reform and pay equity. Prior to joining IWPR, she worked at the Council for Urban Economic Development in Washington, DC. Ms. Sinzduk currently coordinates the outreach programs for IWPR's *Status of Women in the States*, unemployment insurance, and paid family leave projects.

Stephen Sugarman, J.D.

Agnes Roddy Robb Professor of Law

School of Law

University of California Berkeley

Stephen D. Sugarman is the Agnes Roddy Robb Professor of Law at UC Berkeley. He teaches Torts and in the Social Justice curriculum. His recent books include *Regulating Tobacco* (with Rabin, 2001); *School Choice and Social Controversy* (with Kemerer, 2000); and *All Our Families* (with Mason and Skolnick, 1998). In 1987, he proposed "Short Term Paid Leave" — a radical restructuring of employee benefits and social insurance that would make the employment relationship in the US far more "family friendly."

E. Kay Trimmerger, Ph.D.

Professor of Women's and Gender Studies, Sonoma State University

Affiliated Faculty Member at the Center for Working Families, University of California Berkeley

E. Kay Trimmerger, a sociologist, is professor of Women's and Gender Studies at Sonoma State University. She is affiliated with the Labor Project for Working Families and the Center for Working Families at U.C. Berkeley. Her policy research focuses on how to structure family and medical leave policies to include the caring needs and responsibilities of single and childless adults.

Eileen Trzcinski, Ph.D.**Associate Professor, School of Social Work****Wayne State University**

Eileen Trzcinski received a Ph.D. in Economics and Social Work from the University of Michigan. She is currently an Associate Professor in the School of Social Work and co-ordinate faculty member in the College of Urban, Labor, and Metropolitan Affairs. Her areas of research center on family policy and labor market policy, both on the national and international level. She has written extensively on how family leave policy affects the employment of women and has conducted analyses of family leave policy both nationally and cross-nationally. She has worked as a Visiting Research Scholar at the German Institute for Economic Research and at the Fachhochschule fuer Wirtschaft, Berlin. Currently, she is the recipient of a two-semester fellowship from the Kosciuszko Foundation and is working as a Visiting Research Professor at the Institute of Sociology, Jagiellonean University, Krakow, Poland.

Marilyn Watkins, Ph.D.**Economic Security Policy Director****Economic Opportunity Institute**

Marilyn Watkins is Economic Security Policy Director at the Economic Opportunity Institute, a non-profit which promotes public policy in support of working families in Washington state. Marilyn works primarily on issues of family leave, retirement security, and state fiscal policy. She earned a Ph.D. in United States history at the University of Michigan and has a B.A. in Social Studies from Harvard University. Before joining EOI, Marilyn worked as a historical consultant for Northwest Indian tribes and taught courses in Pacific Northwest and American women's history. She is author of *Rural Democracy: Family Farmers and Politics in Western Washington, 1890-1925* (1995) and several articles on the community basis of political reform movements.

Marie Young**Senior Program Manager****David and Lucile Packard Foundation**

Marie Young is a senior program manager in the Children, Families, and Communities program at the David and Lucile Packard Foundation. She currently serves as chair of the national Early Childhood Funders Collaborative, a group of 20 foundations that provide funding for early childhood education, and she represented the Foundation on a California-wide task force to develop a master plan for early education. She was also recently elected to the board of Grantmakers for Children, Youth and Families. Prior to joining the Foundation staff in 1996, Marie worked as a medical social worker, child care center director, community college instructor, and child care consultant. Ms. Young also spent several years leading efforts to create integrated community-level health care, social service, child care, and transportation systems. For seven years she served as a local school board member. Ms. Young holds a B.A. degree from Stanford University and an M.S.W. from the University of California at Los Angeles.

Appendix D

Colloquium on the Benefits of Paid Family and Medical Leave

March 15, 2002

Institute of Industrial Relations
University of California Berkeley
Berkeley, CA

Co-hosted by the Institute for Women's Policy Research and
the Institute of Industrial Relations, University of California Berkeley

Resource Notebook

Partial Table of Contents

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