This chapter appears in:
Work and Life Integration in Organizations:
New Directions for Theory and Practice (2005)
E. Kossek, S.Lambert (Eds.)
Lawrence Erlbaum Associates: Mahwah, NJ

7

When Firms Restructure: Understanding Work-Life Outcomes

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INTRODUCTION

Organizational structures are commonly neglected in the analysis of work-life balance opportunities (with important exceptions, such as Lambert, Waxman, & Haley-Lock, 2002). These factors, often in the background, interact with the more typically identified factors such as attributes of individual workers and the work-life policies and strategies adopted by a firm and its managers. Our ongoing research examines the interrelationship among structural changes in industries and firms, managerial strategy, and jobs. We focus on internal labor markets and implications for the quality of jobs, particularly the changes in lower-skill and lower-wage jobs, and for opportunity or mobility. In this chapter, we extend that framework to consider implications for work-life integration opportunities as well.

Our Analytical Framework

A key element in the structure of "work-life opportunities," as Lambert and Haley-Lock (2004) put it, is workplace flexibility. We consider two elements of flexibility: schedule flexibility and career flexibility. Flexibility can be *employer-*

driven or *employee-driven*. In the arena of schedule flexibility, for instance, employers who are capricious in their flexibility requests of employees mark the extreme of employer-driven flexibility; Lambert, Waxman, and Haley-Lock (2002) suggest the term *instability* rather than flexibility to describe this situation. At the other extreme are employees who come and go without making an effort to notify supervisors or to try to cover their shifts. It is certainly possible to combine employer- and employee-driven flexibility, as in the case of employees who need flexibility to respond to their life events and family and who will work cooperatively with supervisors and other workers to maintain staffing, and employers who have work practices that allow flexibility within the constraints of maintaining needed-staffing levels. Similarly, where career tracks are concerned, in some cases the employee must do all the adapting: Companies demand geographic relocation and total devotion to the company as a condition of upward mobility, or they simply offer no avenues for promotion within the company, requiring the employee to rely on his or her own devices to move up. But in other cases, businesses accommodate employees' needs for stability and/ or flexibility.

Our study tracks how the organizational structure of opportunities and constraints shapes these aspects of flexibility in case studies of 36 firms in four industries: electronics manufacturing, food service, financial services, and retail sales. Our theoretical perspective is that work-life outcomes emerge through a recursive process among various factors including organizational structure, trends in the broader industry and the economy as a whole, managerial strategy, and worker preferences. Contrary to frequent argument, a single factor such as technology or managerial dictates does not determine work-life outcomes, nor are work-life outcomes fixed at a single point. We focus not only on the managerial strategy as originally conceptualized but also on how it evolves during and following implementation (interacting recursively with the environment, often yielding unintended consequences). Our perspective challenges a rational-choice view that policies and practices are the outcome of planned, strategic initiatives that reflect corporate decision making in a straightforward or deterministic manner. Akin to bounded rationality theories (Simon, 1976), we propose that decision makers do not consider all possible options, and furthermore, we propose that even the bounded rational choices that are made in constructing strategy will be transformed through the process of implementation (Weick, 1995; Ortmann & Salzman, 2002). Moreover, there is variation in outcome, within and between firms. Firms, and even sites within firms, can pursue disparate strategies for long periods of time, even when operating under similar environmental conditions (e.g., in the same markets). Practice may diverge from official policy.

From at least the 1930s, most large U.S. businesses have organized work in internal labor markets: long-term jobs with predictable wage progressions and opportunities for upward mobility. During the 1990s, much analysis of corporate

restructuring depicted the dissolution of such internal labor markets and of workplace commitment in general (Cappelli, 2001). The outcome was thought to be a nomadic workforce that moved from firm to firm, changing career, skills, and employment conditions every few years. In this scenario, accommodation of work-life issues are mediated by the market and presumable outcomes depend on whether it is a seller's or buyer's market at any given time. In earlier work based on case studies that overlap with the ones reported on here, we questioned these commonplace sweeping assertions of the decline of internal labor markets (Moss, Salzman, & Tilly, 2000, 2002). We found, consistent with our theoretical suppositions, that corporate restructuring is highly iterative, consisting of a long series of large reorganizations and small adjustments rather than a small number of decisive changes. Moreover, although businesses did replace long-standing internal labor markets with more market-mediated relationships, they subsequently rebuilt internal labor markets in a variety of ways. We replicate these findings, based on a larger sample of firms, in this chapter.

The implications for work-life integration are mixed. Given the current balance of forces between businesses and workers in the United States, it is not surprising that we find *employer*-driven flexibility predominated in the 1990s, at the expense of *employee*-driven flexibility. Consonant with this business domination of the terrain of flexibility, we also find that shifts in either kind of flexibility are, for the most part, incidental to firms' pursuit of other goals. However, in our sample, businesses are about as likely to move in the direction of flexibility that benefits workers as in the opposite direction. Recent restructuring has neither broadly expanded nor radically narrowed workers' degree of choice or control over flexibility. In a more global view, it could be argued that by providing service outside of standard work hours, firms require some workers to sacrifice standard or predictable work schedules to provide flexibility, or at least convenience, to other workers in their lives as consumers.

Focus and Outline of the Chapter

Out of the many possible directions of restructuring, we focus on two: outsourcing of functions from the firm and the creation of remote facilities—in particular, call centers. Most of our case studies center on large, leading-edge firms. We supplement these core firm case studies with studies of suppliers to selected core firms and, in a few cases, to smaller competitors. Our sample may not represent the full spectrum of current corporate practice but it represents both emerging trends in core firms that are likely to be emulated and some of the variation within our chosen industries.

Our research focus is on *re*structuring and, in particular, on the path and process of restructuring over time. In our discussion, however, we have embedded business restructuring strategy as one element in a broader analytical framework. In this framework, we look at the impact of two more static structural

factors: industry and occupation. We also examine labor supply, which in reality interacts with business strategy in fairly elaborate ways, but we largely limit our attention to the point-in-time effects of differences in labor supply. The idea of the broader framework is both to verify and begin to explore the importance of these other structural dimensions and to peel them back or control for them in order to demonstrate that restructuring has an independent effect on work-life balance.

In what follows, we start by presenting our methods and sample. We then report first on schedule flexibility outcomes and then on career flexibility; in each case we march through differences by industry and occupation, labor supply effects, and finally the iterative pathways of corporate and managerial strategy. Our goal is to contribute to work-life integration research by examining the changing nature of the stage (organizational structure and strategy) on which specific, firm-level policies and practices about work-life integration are developed and by examining the new job structures as they affect work-life integration.

METHODS AND INDUSTRY BACKGROUND

Our research consists of case studies of 32 companies, not all of which are discussed in this chapter. We have gained varying degrees of access to companies, but our goal—successfully realized in the majority of cases—is to speak to top managers, human resource (HR) officials, and frontline managers (as well as in some cases workers) at each site we visit. We learned about the trajectory of change in internal labor markets primarily by asking retrospective questions. In addition, the unintended benefit of the long time it takes to complete the cases (often due to the logistics) is that we are able to observe the changes in real time. Data gathering extended from 1996 to 2003.

Our interviews were open-ended and in-depth. We emphasized the gathering of detailed qualitative information. The interviewees at comparable levels in the organization were administered essentially the same interview protocol, but with particular added questions and follow-up prompts tailored to the particular industry or specific changes that had recently occurred in the individual company. Our data give us a useful window for understanding how industry and organizational restructuring have affected work-life questions as our standard interview protocol begins with a request for a detailed career biography of our interviewee.

Our sample of cases includes:

- 6 companies in financial services.
- 6 in retail.
- 2 third-party call centers.

- 14 in food, including food servers, wholesalers, and manufacturers.
- 8 in electronics manufacturing.

At the time we studied them, these companies employed a total of 1,136,00 people. All company and employee names in this paper are pseudonyms.

Retail and financial services have disproportionately female workforces (in 2002, 50% in the case of retail and 61% for financial services, compared to 47% for all private nonfarm employment; the retail percentage is much higher in particular retail subsectors, such as department stores with 67% women in 2000) (U.S. Bureau of Labor Statistics, n.d.; U.S. Census Bureau, 2003). In recent decades these sectors have grown and have attracted large numbers of women managers.

In contrast, food service and electronics have few women managers. In electronics manufacturing this tracks the demographics of the industry's overall workforce (which is only 36% female, based on the Computer and Electronic Products manufacturing category). In food service, the reasons are less transparent. Staff at food and accommodation establishments is 53% women. Looking further back on the supply chain to include food distribution (26% women) and food manufacturing (37% women) changes the picture significantly but still results in a cumulative female percentage of 49% (U.S. Census Bureau, 2003). Yet, perhaps because of the enduring influence of the male-dominated chef system, men occupy the lion's share of managerial jobs in the predominantly female food service industry.

We studied retail and financial firms' creation of remote sites (in particular, call centers) to pursue new channels of service delivery and study electronics and food manufacturers' expansion of outsourcing to reap lower costs and the advantages of specialization. In each industry these processes, which we term the *de-integration* of particular functions, have taken place within the context of other changes, which we describe in more detail elsewhere (Lane, Moss, Salzman, & Tilly 2003; Moss, Salzman, & Tilly, 2000, 2003). Our task, then, is to explain variations and changes in work-life flexibility within these turbulent contexts.

FINDINGS

Hours Flexibility

In terms of hours worked, we found little employee-driven flexibility and much employer-driven flexibility. Our data suggest several important factors that shape how changes in firm and industry structure have altered the hours flexibility available to—or, more often, imposed on—entry-level workers.

Industry Matters for Hours Flexibility. The key distinction across industries that influences hours staffing is that between goods-producing industries and service—producing industries. Goods-producing industries such as food manufacturing and electronics manufacturing can inventory goods and can run production shifts that do not vary greatly during the day or among days of the week or of the month. This is not true for service—producing sectors such as food service, retail sales, and much of financial services, which respond to the daily, weekly, and monthly demand schedules of consumers, in a clear-cut case of employer-driven flexibility. In fact, much of the demand for consumer services such as those provided in retail and financial call centers falls outside of normal work times. Ironically, work's demands on retail and call center *customers* dictate that these sector's *workers* must serve the customers at times traditionally devoted to rest or to household work. Call centers are typically open very early in the morning to very late at night and on weekends, if they are not open 24 hours per day, 7 days per week.

Recent technological changes allow retail and financial customer service jobs to be inventoried to an extent, lessening somewhat the need to respond immediately to consumer demands. Self-service through the Internet and telephone voice response units (VRUs) is the most important of these developments, and many firms in our study made efforts to increase the proportion of transactions that customers could handle themselves over the phone or through the Internet. E-mail correspondence also allows customer service representatives to schedule responses independently of the customer inquiry. However, we found in our most recent interviews that many companies are now striving to integrate sales pitches into customer-initiated service calls (in part because of limits imposed by the Do Not Call list) and therefore are trying to drive some business back to phone representatives.

At the food manufacturers and electronics manufacturers with whom we spoke, not all workers are permanent—several firms hire from temp agencies or assign entry workers to temporary status for a period of time—but all workers are full time, and hours generally are fixed for permanent workers. In contrast, food service operations are dictated by the rhythm of mealtimes, and cafeterias and restaurants are much more likely to employ part-timers and to change work schedules with little warning. At the Picnic Basket restaurant chain, work schedules are posted only 4 days before the work week starts, and a district manager told us that on slow days restaurant managers are expected to send workers home, which makes their pay unpredictable and flexible as well.

Industry differences *among* call centers also affect scheduling patterns. Jobs in finance call centers are more likely to be full-time jobs with steady schedules. For many types of financial transactions, industry standards require that customer service representatives (CSRs) pass licensing tests in order to make financial transactions over the phone, and companies typically provide the necessary training. Thus, managers of financial call centers expressed particular

concern with recouping their training investments and retaining talented workers. Employees with more education and training have, on average, higher career expectations and are less likely to be satisfied with part-time or unstable employment.

But not all financial service call center jobs are full time. Call center jobs in banks, most of which do not require licensure, may adopt a more flexible method of staffing. For example, the customer service director at MultiBank described employer-driven hours flexibility at its call centers:

Respondent: We hire all of our employees in typically 30-hour flex positions. That means that they're guaranteed 30 hours but that we may schedule them anywhere between 30 and 40 hours. They give us 6 days a week availability, 9 hours within those days. Then they may be scheduled anywhere within that 9-hour window, usually 4 or 5 days a week. So that helps workforce management in filling in the holes.

Interviewer: And at what point do people move from flex . . . into full time or part time?

R: They first schedule a change request. We have like a 5-month waiting period, I guess, after you're hired that we won't look at a schedule change request until 5 months, unless it's an emergency schedule change, which comes to like day-care or medical reasons, that type of thing. So [the employee] put[s] it in and when it meets the business need, then it would be approved at that point.

Lambert, Waxman, and Haley-Lock (2002) describe similar flexible scheduling arrangements.

Job Level Matters for Hours Flexibility. Employer-driven hours flexibility varies by the level of the job. Entry-level workers in retail call centers are more likely to be part time than full time, to be assigned the least desirable hours, and to have unstable schedules. At retail cataloger Just for Her, where call centers run 7 days, 22 hours, new employees start on night and evening shifts and typically seek to move to days as quickly as possible. The client services manager lamented, "The problem is not so much that we don't get good people, but that people hope to move quickly from evening or night to day. They say, 'My baby-sitting arrangement broke down,' and they expect to move to days."

Hours flexibility does not vary along the job ladder in a simple fashion, however. At the upper end, managers may have more discretion about when to arrive at and leave from the workplace but are often called on to work longer hours and fill in for others as needed. A manager at MultiBank described one of the bank's top sales managers as "selling 24 hours a day," whether at work or not. And while low-level workers can swap shifts at many companies, in-

cluding MultiBank, Just for Her, and Picnic Basket, managers do not have this option.

Labor Supply Matters for Hours Flexibility. The pull toward trimming costs encourages firms to staff their call centers with part-time employees with fewer benefits, lower pay, and scheduling matched to demand, while the objective of higher quality service leads firms to create full-time jobs with better-trained and motivated employees. Where firms end up on this continuum depends not only on the firm's strategy but also on the labor market conditions the firm faces. The more abundant, and the more capable the available labor supply, the more latitude the firm has to maintain employer-driven flexibility and to deny employee-driven flexibility. The cyclical and seasonal state of the economy, the location of the firm in relation to competing firms, and the demographic composition of available employees all affect the supply of labor.

The exceptionally low unemployment during 1998–2000 affected the hiring and staffing strategy at several firms we studied. In such tight labor markets, prospective employees gain a bargaining advantage, as do current employees who can implicitly or explicitly threaten to quit. Alicia, the codirector of call center operations at the Clarendon retail chain, indicated that the tight labor market conditions had shifted the balance toward employee-driven scheduling.

> We have tried to keep as much of a flexible workforce as requested and I think that is what has given us our competitive advantage over the years . . . [W]e could hire someone [who] would be working in the 15–20 hour range throughout the year and then be able to get up to 40 and beyond during our peak season. That whole situation has changed. The people either want more hours or fewer hours and there are more limitations, so our ability to stretch during that peak time has been reduced significantly. So we either have to hire more people with lesser availabilities and/or full-time people.

The demographic composition of the available labor force influenced several of our firms' staffing decisions, and in turn that demographic composition was partly a result of company location decisions. Moreover, in addition to reflecting the available supply, the demography of a particular firm's workforce also reflects the part-time versus full-time strategy the firm has adopted and what groups of workers best fit that strategy (Tilly, 1996). Women make up the majority of financial services call center representatives and a sizeable majority of retail call center representatives. Clarendon's Alicia reported 90% of her employees are women; at Treats, a gift cataloger, the figure is 70%. Housewives appear to be particularly desirable employees, but they have become less available. For example, Alicia explained,

> We've had a tremendous change in the labor market in that when we started the call centers we were primarily getting housewives [who] had kids in school, or

> [who said,], "I'll come in and work, I can work from eight in the morning until three, then I need to be home because the kids will be home from school," and then you had the other housewife [who] would say, you know, "I don't want to work during the day, I'd like to be there when my kindergartener gets home, but as soon as my husband gets home and I get dinner on the table then I can be in at six or seven."
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> So we got a lot, and that's how we first started [in the early 1980s]. I mean, it was a wonderful workforce. They were reliable, they knew how to measure curtains, they knew how to measure jeans, they knew all about taking care of a family, so they were very good customer service reps. Now, that labor market has dramatically changed, as you know. Everyone has two people in the family working these days. . . .
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> So what we get now is we still have a lot of the old-timers [who] have been with us for years. . . . But we're getting second-jobbers now. They work a full-time job and they want to supplement. And/or we still get a few women [who] want to be home during the day when the kids get home from school and stuff, but they'll come in and work in the evening when their spouse is home. . . . We get students in most of our cities; we do have colleges.

The demographics of the available labor force are determined by location as well. One of the call center locations of Treats is a university town. Sandy, Treats's operations manager, told us, "The workforce there is younger, students. We can give them a very flexible schedule. They can go to class, come back and work for 2 hours, go back to class, come back and work for 2 hours."

Of course, the location decision itself is a strategic decision by firms. A business may locate a call center to tap a labor force of housewives interested in part-time employment. But if both pursue a zero-sum objective, one firm's strategy may negate another firm following a similar strategy (e.g., both moving to the same location for low-cost labor supply or to be able to recruit the highest quality workers). This situation faced Marketplace Stores in its CenterWest call center location, where a variety of other companies' call centers also had chosen to locate. Facing the loss of employees to higher-wage call centers, managers at this call center indicated that they were offering more schedule flexibility as one strategy for attracting and retaining workers.

Corporate Strategy and Managerial Discretion Matter for Hours Flexibility. Market pressure and competition constrain much of what a firm does, but competition does not dictate a unique competitive strategy. Many firms have sufficient discretion to adopt varying strategies to respond to market competition. In addition to the location decision, which we have already touched on, the strategic decisions on which we focus in this study are: first, *whether* and *how much* of the firms' operations to outsource or shift to remote sites; and second, *how to do* the outsourcing or de-integration, specifically, how to balance the frequently competing objectives of lowering costs in the short run and boost-

ing quality and service. One key strategic decision in retail and financial services is the decision to transform the vehicle for delivery of services from stores or local offices to call centers. This generally extends work to nontraditional night and weekend times, in practice heightening employer-driven flexibility. In a typical description of retail call center staffing, the HR manager at Clarendon's Southwestern center reported that it usually recruits workers as part time and has people starting every quarter hour, with shifts ranging from four to seven hours in half-hour increments. Sandy, the Treats call center manager, indicated, "It'd be nice if you could just hire 240 seats, 8–4:30. But that's not how the calls come—there are a lot more at certain times of day."

The choice to staff the retail call center with flexible part-time workers in response to consumer demand is not without problems for management. We asked HR and operations managers about the biggest challenges in running call centers. Even in 2002–2003, long after the 1990s hiring boom had cooled, we got answers such as "Making sure you have enough people who are qualified [and] who will be here during the hours you want them" (Treats) and "The challenge of staffing for the variability in call volume" (Style Associates, another cataloger). The manager of Clarendon's Southland call center reported that the most common complaint among employees is not enough hours.

Outsourcing has also had an impact on the degree of hours flexibility available to entry-level workers in the industries we have studied. For instance, food servers such as cafeterias and restaurants prepare less and less food on site, preferring to purchase the items from food manufacturers (Lane, Moss, Salzman, & Tilly, 2003). Food service jobs, which are consumer-demand scheduled, are frequently part time; food manufacturing jobs, which are machine-scheduled, rarely are. On net, this outsourcing has shifted jobs from part-time to full-time status. Although food manufacturing jobs undergo seasonal fluctuations, they have more stable schedules than those in food service. In electronics, the outsourcing of functions and jobs from final manufacturers probably has had little effect on the degree of part-time work, the shifts available to production workers, or the degree of schedule predictability.

In addition to creation of remote sites and outsourcing, a third strategic shift we observed was the professionalization of call center jobs—a step that itself in some cases involved outsourcing of peak-load call traffic to third-party call centers in order to stabilize the hours of the core call center workforce. Particularly in financial services, but also in retail sales, companies have been shifting the view of call centers from a cost center primarily concerned with order taking to a value-adding center within the company that increases repeat sales through better customer service and "cross-selling" or "up-selling" by selling the customer more or more costly merchandise when he or she calls to place an order. In some places, this involved an effort to train order-taking call center workers into skilled sales people similar to those who work in upscale retail stores. One

of the steps in this professionalization process has been to transform part-time customer service representative jobs into full-time jobs.

While the professionalization of call center jobs can be seen as a step up for call center employees—better training, more upward mobility, more opportunity for full-time status—there may be some costs in the loss of a wider range of schedule choices. In particular, some women who preferred to work "mother's hours," 9:00 to 2:00, for example, may now have less opportunity to do so. The replacement option may be the full-time mother's shift, in which mothers leave the house when the father gets home and can watch the children. At MultiBank, for example, tellers worked part-time schedules, including mother's hours shifts, 10 or 20 years ago. Today, MultiBank has moved to make most tellers full-time, and mothers of young children are more likely to work a late afternoon or evening mother's shift in the call centers. The mother's shift imposes significant stresses on the family, because it makes it difficult for a mother to see her children or her husband.

To recap, we have identified three major changes in our industries that affect the hours scheduling confronting employees. First, in retail, transactions are shifting from stores to call centers. Retail stores are backing off from expanded hours, while call centers are expanding hours toward 24/7 coverage. Overall, then, demands for employer-driven flexibility are increasing in retail. Second, the increase in outsourcing of food preparation by food service firms to food manufacturers is increasing the relative amount of full-time work and predictable schedules in food service. Finally, within call centers in both retail and financial services, call center work is being professionalized, which has the effect of curtailing the proportion of jobs that are part time and of increasing the proportion that are full time. These last two developments increase the career possibilities and pay and benefit conditions of call center jobs to some extent but reduce certain hours arrangements that benefit some families. The professionalization of call center work has also affected career mobility, to which we now turn.

Career Flexibility

The second dimension of work-life flexibility we examine is *career flexibility*. Again, flexibility can have two meanings: the degree to which an employee must adapt his or her life—particularly by relocating—in order to pursue a career and/or the degree to which a company will adjust its career ladder to accommodate employees' life needs. As in the case of work hours, we found (consistent with Moen, 2003) that the employer rather than the workers typically drives patterns of career flexibility over the life course. However, we also found more examples of employees who were able to limit these employer demands and, in some cases, obtain flexibility on their own terms. Once more, we focus on four

job characteristics that shape the nature of flexibility: the industry, the level of the job, the balance between labor supply and labor demand in a particular place and time, and strategic choices by corporations. We discuss each in turn.

Industry Matters for Career Flexibility. The striking industrial divide in career flexibility cuts between retail and financial services, on the one hand, and food service and electronics manufacturing, on the other. In the former two sectors, we found a managerial "mommy track" that allowed women to undertake childrearing and still pursue a managerial career (whether simultaneously or sequentially). In food service and electronics manufacturing, however, this type of flexibility was far scarcer.

For instance, Gladys started as a clerical worker in At Your Service (AYS), a subcontractor providing telephone customer service for Marketplace Stores, and climbed the ranks as Marketplace absorbed AYS; 10 years later she was occupying the position of HR director of a call center with over 1,000 employees—the whole time in a single southwestern metropolitan area. Consolidation of companies through mergers and acquisitions—a common pattern in all four industries we study—often brings with it expanded mobility opportunities such as the ones Gladys enjoyed.

Sally of MultiBank at first appears to be a counterexample: She charted an upwardly mobile course that involved frequent branch-to-branch moves—"probably ten" branches in eight years. But in fact, all her moves took place within a geographically compact area that did not require relocation. Sally's background before coming to MultiBank reinforces the career flexibility available in retail and financial services—and indeed the possibility of mobility between these two industries. After high school (she did not attend college), she worked as an insurance underwriter, then left paid work for a few years "to take care of my kids." She then went to work as a front-end (cashier) manager in retail on a part-time basis and shifted to MultiBank at first in a part-time teller job. Today she manages the largest branch in her region. Sally's boss, Laura, who oversees 14 MultiBank branches, followed a similar path: She started out 24 years earlier as a part-time teller who worked opposite shifts with her husband and went on to work in half a dozen locations, but all in the same bank (give or take a few mergers and acquisitions) and the same area.

Contrast these geographically localized upward trajectories with stories from electronics manufacturing and food service. Perhaps the most extreme example is Helmut, head of a high technology product division within Monarch Electronics. After Helmut had worked as an engineer and engineering manager for a European company for 15 years, Monarch acquired the company and he moved to the midwestern United States to work with Monarch engineers. Achieving success in one division, he was made head of a second, more troubled division that at the time was viewed as a "meat grinder," in his words. Not long after, in 1993, "I took the job to globalize the division," and when we spoke to him

in 1996 he had for years literally spent two weeks of each month in the Midwest and two weeks in Europe.

We did not find other cases of managers whose careers required them to be in two places at once, but examples of managers who jumped from location to location to get ahead were common in electronics and food. Mike, a manager at Great Meals (a large institutional food service contractor), advanced from running coffee services at a university to serving as a regional manager. In the process he hopscotched from the mid-Atlantic to Florida, back to the mid-Atlantic, and finally to New England. His job has been based in New England since the late 1980s but requires him to range across the New England states visiting food service sites. Mike, like Helmut, clearly has paid a price in terms of opportunities to spend time with family, as well as over raising a family in a stable location.

In the four industries, the availability of managerial career paths that incorporate childrearing is linked to broader demographic patterns in each industry's workforce. It is not coincidental that our managerial examples from retail and finance are women, whereas the examples from electronics and food are men. This mirrors the composition of managerial ranks in the four industries.

Job-Level Matters for Career Flexibility. Despite the opportunities for women to rise to management in retail and financial services, the mommy track in these industries should not be confused with the "fast track." As we scan up the hierarchy from supervisors and managers overseeing a dozen employees to those managing hundreds or thousands, we still find women in many cases, but their work histories often look quite different: Employers are dictating their career paths rather than accommodating employee-driven flexibility. At MultiBank, we profiled Sally and Laura, who rose from part-time tellers to branch manager and area manager—but the staffs they manage amount to 10 people for Sally and 121 in Laura's case. Kathleen, on the other hand, heads MultiBank's call center operations, with 900 employees. She commenced her education in Ohio then continued it in the mid-Atlantic, earning two master's degrees (unlike Sally and Laura, who never attended college). Her banking career began in with an Ohio-based bank that promoted her from project work to management, but she then hopped to another bank in Minnesota, only to hop again to MultiBank in another Midwestern state. Kathleen rose far, but only by adopting a stereotypical corporate model of geographic mobility in pursuit of career opportunities.

In the catalog call centers of broad-line retailer Clarendon, a similar contrast can be drawn between Bea, a shift manager over 300 employees at the Southland call center, and Alicia, one of two top managers responsible for all 7,000 call center employees. Bea was teaching preschool, and "my middle son went to live with his father in Colorado and I decided I needed a part-time job to keep up, to occupy my time." She started part-time at the Clarendon call center while

continuing to teach preschool, but soon became a trainer and then manager of a small part of the operation and finally shift manager—over a 15 year period based at the same call center. Alicia's career had a similarly modest beginning—she never attended college and worked as the catalog desk manager at a Clarendon's store in the Northeast. But Alicia moved to a regional training position, then to a distribution center in the Midwest, and at that point her career took off. She was involved in setting up Clarendon's first call center, based at this distribution center, bounced between three other locations in the Northeast and Midwest as she started additional call centers, and finally—17 years after starting at Clarendon—settled in the Southwest where call center operations are now headquartered. We saw similar contrasts between the biographies of store managers and those of their subordinate managers.

Even at the very male, hard-charging environment of engineering at Monarch Electronics, where we saw Helmut's bicontinental job, lower-level jobs permit more family-friendly trajectories than the top positions. Lance, a veteran Monarch HR official, commented on the situation of Helmut and other global managers:

> At the human level, how long can you be a global warrior? . . . [Helmut] is worn out. . . . The scariest thing about my career if I look ahead and say, I'm 45 years old. I'm at [Monarch]. I travel 30% of the time now globally. If I continue on a path like this, why wouldn't it be 80%? How could I . . . I cannot imagine it being like that. How much can you take?

And in fact, Monarch provided an implicit "daddy track" for *individual contributors*, engineers who prefer stability to a management career. Frank, a Monarch software engineering manager, commented on the location of Monarch's main U.S. engineering facility: "[City name] is a good place to raise a family, so, I swear, 80% of the people we hired have kids between the ages of two and six. So people who won't work in California, won't work in Boston, won't work in Texas are glad to work here because they have California technology and get to do it in a place that's family-friendly." Shortly after we spoke to Frank, he left the company. His interim replacement, Art, explained, "[Frank] grew up in Sioux Falls, and he had an opportunity to go back there for a job. I'm the same way—if a job came up in Green Bay." He added, in words that were particularly striking coming from a man, "We *have* a software culture here. It's our own software culture, not a California [Silicon Valley] culture. . . . I shoot people if they're here weekends. . . . My kids are seven, four, and two. I work for two companies. One is Monarch, and the other is [Art's last name], Incorporated—the CEO's my wife!"

Labor Supply Matters for Career Flexibility. Monarch's appeal to software engineers seeking a family-friendly area illustrates how companies re-

spond to labor supply in striking the balance between employer and employee flexibility needs. As Frank remarked, "Instead of trying to say, 'Well, we have a dinner theater and we have rock concerts,' we say, 'We have good schools and we have 5-minute drives to work.' . . . So instead of trying to compete with Silicon Valley technology and culture, we play into families, [a shorter] commute drive." Given that the company must rely on this market niche to attract software designers, Monarch tolerates managers like Art—even though these managers go against the predominant company culture, summed up by management in the principle of *push*, which means running "in the red zone on the tachometer," in the words of Monarch HR's Lance.

We observed an analogous adaptive process, though one with a completely different outcome, at the CenterWest Marketplace call center where Gladys handles HR duties. The call center relocated and found itself close to call centers of two major financial service providers and a mail order computer sales company. According to Gladys and other managers, Marketplace simply could not match the $12–13 starting wage of these other call centers (pay started at $8.40–11.85 at the Marketplace center, depending on the job). As a result, Gladys said, the company had developed "a system that supports churn"—to the tune of 88% turnover in the previous year. The Marketplace call center did its best to retain employees by offering schedule flexibility, less rigid work rules, and innovative benefits, but managers were resigned to replacing a substantial chunk of their workforce each year.

At Treats, the gift mail order company, the labor supply available in its rural Midwestern location facilitates yet another career pattern. Treats has a core workforce of 260 but this number increases to 4,000–5,000 during the holiday giving season, necessitating a huge seasonal workforce, including large numbers of seasonal supervisors. But interestingly, about half the seasonal workforce–and up to 59% in the largest Treats call center—consists of workers who are returning from the previous year. Some seasonal employees have worked yearly for 40 years. According to Treats' operations director:

> A lot of them are stay-at-home moms or retired—or this is their only job—they like summers off and being able to create their own schedules. . . . Company wide, a good share of our returning employees . . . are retired [and] enjoy working at [Treats] both for the socialization and outlet as well as [for the] additional holiday income.

The combination of a highly rooted rural population plus Treats' position as the largest employer in several small towns allows the company to fashion stable careers out of the most unstable of jobs. Although employer-driven, this pattern meets employee needs as well.

In short, the nature of available labor supply—including what other companies are offering to the relevant labor pool—shapes the career patterns each

company creates, even after taking into account cross-industry and job-level differences. Moreover, as the Marketplace example illustrates, the labor pool changes, based on strategic decisions by a company and by its competitors in the labor market. Labor supply and corporate strategy respond to each other.

Company Strategy and Managerial Discretion matter for Career Flexibility. Company strategy and managerial discretion might appear, at first, to have entirely opposite types of implications. One might expect company strategies to vary systematically, with systematic implications for career patterns. Contrariwise, one might expect managerial discretion to lead to a wide range of fairly unpredictable outcomes.

In our company case studies, neither expectation is completely borne out. On one hand, company strategies include a large component of experimentation driven by fairly speculative beliefs about the state of the world. On the other hand, managerial discretion often follows stable, deeply embedded social and economic patterns. In both cases, however, the implications involve variation in *employer*-driven flexibility rather than openings for *employee*-driven flexibility.

First, briefly consider two examples of managerial discretion. Monarch's Art, as described earlier, used his managerial power to discourage engineers from working weekends. This flouted the principle of push touted by top managers. Yet it reflected the reality that Monarch's strongest appeal to software engineers lay in a family-friendly lifestyle—a lifestyle not consistent with the thoroughgoing implementation of push in the workplace.

At Clarendon, Alicia recounted how, about 10 years before we spoke to her in 2000, top executives issued a directive to "get some more outside blood in"—bring in more managers from outside the company, altering career trajectories. "And we did really work hard at that," she continued, "and we ended up with a few good people. The truth is, they didn't stay with us." In many cases the outside hires quickly left for more money. In other cases, "when I did hire a college grad, the person was not reliable. They thought they were still in college, I guess. They tend to have attendance problems; they would do stupid things." Alicia soon reverted to promoting from within at the same rate as before, ignoring the corporate mandate. In addition to Alicia, we spoke to managers at the Southwestern and Southland Clarendon call centers who had been in management at the time of the outside blood directive—but none of them even remembered the policy. The point is not simply that it is difficult for top executives to drive a policy down through the ranks of middle management, but that Alicia and her team of call center managers had worked out a successful HR management model that clashed with increased reliance on outside blood. They had good reasons for sticking with their model.

What about company strategy? Our study focuses on two particular strategic initiatives: the creation of remote sites and outsourcing. Following these two,

we examine the strategy of professionalizing jobs, which we already considered in the context of schedule flexibility.

It seems self-evident that relocating activity to remote sites such as call centers disrupts job ladders, making upward mobility more difficult and often adding a requirement of geographic relocation for promotion. The reality, however, is somewhat more complex. The case of Clarendon is instructive. In the early 1980s, when Clarendon first created call centers, they had three job layers from bottom to top: CSR, shift manager, and call center manager. Opportunities to rise were far more limited than in Clarendon stores, which boasted eight layers in the selling organization, from clerk to store manager. But in the ensuing 20 years, three things changed to alter this comparison. First, within 8 years Clarendon call centers added three more layers: senior CSR, team leader, and operations manager, bringing the number of layers to six. Their stated goals were to motivate and retain workers and to increase supervisory capacity. Second, more recently Clarendon stores removed two layers, bringing their total down to six. Third, over time Clarendon call centers grew to a typical size of 500 employees, whereas stores remained at 150 to 200, with the uppermost end around 300.

The result is that, far from being a gulag shut off from promotion possibilities, Clarendon call centers offer more such possibilities than the stores do. We recount above Bea's ascent to shift manager. At the same Southland call center, we interviewed four team leaders in the Internet section of the center. Although one was a student working part time who had been at the center only three or four years and did not plan to stay, the others described careers at the center spanning 12 to 16 years. In each case they started out as a CSR, then moved into a variety of more responsible jobs (senior CSR, administrative assistant, customer inquiries, special services), on the way to a lead job. The shift of call centers from very flat organizations to elaborate hierarchies was not limited to Clarendon. We saw it repeated in company after company (Moss, Salzman, & Tilly, 2003).

Above a certain level, of course, upward mobility in the call center worlds of Clarendon and other companies requires geographic relocation—much as it does in the world of Clarendon's stores. The biography of Alicia, Clarendon's codirector of call center operations, illustrates this pattern. In fact, Clarendon's first few call centers (set up by Alicia in the early 1980s) proved a seedbed for top call center leadership: The top two managers in the Southland call center earned their stripes at the original call center in the Midwest; Clarendon's second call center (in an Eastern city) launched the career of the current manager of the Southwestern center and one of his shift managers.

As with the creation of remote facilities, the self-evident notion that outsourcing functions must snap promotion chains is complicated by the evolution of actual business practices. Monarch's outsourcing history documents the twists

this evolution can take. Monarch escalated its outsourcing in the late 1980s. At the outset of this wave of outsourcing, many of Monarch's suppliers looked like Expert Machining. Expert, a family-owned business, in 1980 employed only 12 and annual sales totaled $630,000. But Monarch soon discovered that small companies in the Expert Machining mold lacked the capacity to design and assemble complex components, and thus it made a series of adjustments to its outsourcing strategy. The electronics manufacturer re-insourced some components and helped companies like Expert to integrate vertically and expand its management and design capabilities. Expert ballooned from 12 employees in 1980 to 130 in 1997, with sales of $25 million. Growth expanded career possibilities at Expert Machining. Expert hired assemblers at $8–11 per hour, machinists at rates ranging from $8 for an apprentice to $22 for a master machinist, and engineers—one third of whom were nondegreed designers who had "learned from the school of hard knocks," according to the CEO. From a small shop consisting of machinists and one owner/manager, Expert grew to include some basic job ladders.

But even more important, Monarch shifted to purchasing from larger companies. One purchasing manager said, "I went from looking for a $2 million [per year in sales] company to produce subassemblies to $5 million, $10 million, $15 million—now I think it takes more like a $50 million company." As Monarch sought larger suppliers, it increasingly shifted business from job shops to contract manufacturers. Contract manufacturers are, in general, large employers: Average employment in a printed circuit assembly plant (which describes a large proportion of electronic contract manufacturers) is 148, compared to 95 in computer and electronic product manufacturing as a whole and 46 in machinery manufacturing, the category that includes Expert (U.S. Census Bureau, 2001).

Of the two contract manufacturers we visited, Spectrum had 2,400 employees in two locations in 1998 (it has since grown to 16 locations on three continents); the much smaller Galaxy Electronics (not a Monarch supplier) had 130 employees divided between two plants in 2003. (By comparison, Monarch had 14,000 when we began studying the company in 1996.) But even in Galaxy's small plants, there are well-defined job ladders. Employees can move from hand assembly to machine operation, and from there either to a management track extending up to production manager or to manufacturing support jobs such as purchasing, quoting (estimating jobs for customers), or even engineering. "Well over half our positions are filled internally," reported Galaxy's HR director. He continued,

> Everyone who's in the [engineering] department as an engineering assistant [80% of the engineering staff] started on the shop floor. . . . The general manager came to the facility as a test technician. He moved up to manufacturing engineer, plant manager, and finally general manager. Except for the accounting manager, there's

> not a single person in a management position in [the larger of the two plants] [who] didn't come in through [Galaxy].

In short, over time Monarch shifted its sourcing to larger subcontractors with more developed internal career ladders, expanding the possibility for upward mobility at a single location. However, it is only fair to add that shortly after we ended our Monarch case study in 1998, news media reported that Monarch was pushing its suppliers to relocate to Mexico or Asia. Another wave of corporate strategy threatened to undo the opportunities for mobility in a fixed location that the previous wave had created.

Alternatively, outsourcing in food service unambiguously expanded opportunities to move up the career ladder (Lane, Moss, Salzman, & Tilly, 2003). Two outsourcing trends predominated. First, institutional food service—cafeterias at companies, schools, and other institutions—was subcontracted to food service contractors. Second, food preparation was shifted increasingly out of restaurants and cafeterias into food manufacturing settings that provided more and more processed food for final service.

The subcontracting of institutional food service did not change the size of each individual facility—cafeterias still only average 16 employees (U.S. Census Bureau, 2001)—but it linked the jobs in each facility to far more extensive local, regional, and national job ladders. These links became denser as three giant businesses—Compass, Aramark, and Sodexho—came to dominate food service contracting. As we saw with the example of Mike, the regional manager for Great Meals, high-ranking jobs in such food service contractors require geographic mobility. But the same is not true at lower levels of management. Rocky, a Great Meals facility manager, achieved his position by moving among Great Meals locations within a metropolitan area: from chef at a small facility to executive chef at a bank to executive chef at a campus where he subsequently ascended two more steps to become general manager.

Outsourcing food preparation from the restaurant to the factory *does* shift employment to larger units. The average eating place employs 17, whereas employment in the average food manufacturing plant was measured at 73 in 1997 and 55 in 2003 (the drop is due to a change in the definitions of industrial categories); either way, the manufacturing units are several times as large (U.S. Census Bureau, 2001). To see the implications, compare career trajectories of employees at Bellavista, an upscale restaurant, with those at Salads Supreme, a manufacturer of salads and prepared dinners. At Bellavista, which has 14 kitchen jobs, we spoke to a line cook and two chefs. All had worked at a variety of restaurants, jumping from job to job in order to advance in the industry. But at Salads Supreme, a one-plant operation with a core production workforce of 100 (spiking up to 200 during the summer peak season), Meg, the vice president of operations, told us, "Cooks and mixers come up through the ranks. . . . The plant

manager has been here since the beginning of time. One supervisor [of the four], the same thing." (Moreover, Meg, her boss, and two of her supervisors had all moved to Salads Supreme together after working at another food manufacturer in the same metropolitan area.) We heard similar stories at other food manufacturers: a supervisor who started as a production worker 27 years earlier at Deluxe Meats, a plant manager who was shoveling seafood 23 years earlier at Ocean Fresh, and so on.

Thus, outsourcing in food service expanded possibilities for career mobility within a single company and even a single city; outsourcing in electronics and the creation of call centers in finance and retail fractured career ladders but then unexpectedly rebuilt them. But one other strategic shift by companies created new hurdles for upward mobility: the professionalization of management positions. The trend toward professionalization can be seen by comparisons of some of the same managers we have described already. For example, Alicia started at Clarendon in 1972, set up the company's first call center in the early 1980s, and went on to colead the company's call center organization. She rose based on talent and pluck despite not having a college degree, reflecting the "back office" status of call centers in the retail chain for most of these years. In contrast, MultiBank's Kathleen, who entered banking in 1988 and rose to head call center operations in 2003, acquired an MBA and a master's of banking as her entrée to the field. And Alicia's recently hired counterpart in codirecting Clarendon call center operations is himself a younger, MBA-educated manager. We observed similar patterns in banking, food manufacturing, and electronic components.

Over time, this process of professionalization is closing off some of the internal paths to upward mobility we have described in such detail. In these examples and others, three factors affect the degree to which jobs require professional credentials. First, there has been an overall trend toward professionalization. Second, not surprisingly, higher level jobs have professionalized more rapidly. Third, the transition has been most dramatic in rapidly growing sectors such as call centers. In such sectors, the early days offered nearly boundless opportunities for talented individuals like Alicia to rise through on-the-job learning; but as the sectors have matured, companies increasingly have sought to bring scientific knowledge into management.

In summary, many forces shape the nature of career flexibility in the companies we study. Cross-industry disparities, job level differences, and labor market pressures all condition the degree to which a person must move from place to place in order to climb the corporate ladder. But even after taking into account industry, job level, and labor market, variations in corporate strategy also determine career requirements. Corporate strategy giveth, sometimes in surprising ways: Outsourcing and the creation of call centers ended up rebuilding internal labor markets rather than wiping them out. But corporate strategy taketh away as well: Monarch's drive to shift sourcing offshore and the multi-industry drive

toward professionalization have limited the family-friendly mobility opportunities that characterize the histories of so many of today's managers.

CONCLUSION

In this chapter, we have made three main claims. First, we argue that a business' organizational structure, and changes in that structure, have critical implications for work-life balance. Second, we posit that firm restructuring is not a linear process but an iterative, exploratory one and that, contrary to many accounts of restructuring by U.S. businesses over the last 20 years, restructuring has in many cases either preserved internal labor markets or knocked them down only to rebuild them, though usually in new forms. Finally, we claim that although employer-driven restructuring predominates, and changes in flexibility are usually collateral consequences rather than goals of restructuring, the restructuring we observe sometimes has increased employee-friendly flexibility, sometimes decreased it—making it difficult to generalize about the impact of restructuring.

Our results come under the four headings of industry, occupation, labor supply, and corporate strategy. We find that industry distinctions cut differently on schedule flexibility than on career flexibility. For *schedule* flexibility, the key distinction is between manufacturing industries (electronics, food manufacturing) that can inventory products and service industries (retail, financial services, food service) that must provide service directly to a consumer. Manufacturing industries more typically adopt standard, full-time shifts and predictable schedules, whereas service industries more often run shifts on nights, weekends, and nonstandard or unstable schedules keyed to fluctuations in customer demand and often in inverse relationship to consumers' work schedules. In financial services, foreshadowing the labor supply issue, this tendency toward nonstandard schedules is moderated to some extent by the need to attract and retain skilled workers. For *career* flexibility, one side of the divide is marked by industries in which large female workforces have led to a significant presence of women in the managerial ranks (in our sample, retail and financial services). In these feminized industries, we find, on one side, career tracks into management that accommodate upward mobility in a fixed geographic location and offer more flexibility around family needs. On the other side, electronics manufacturing (with an overwhelmingly male workforce) and food service (with a disproportionately female workforce but continuing male dominance at the management level), management career tracks more often require geographic relocation, potentially placing stresses on families.

Job level, again, plays out differently for schedule flexibility than for career flexibility. Junior employees are particularly likely to be assigned nonstandard shifts, though supervisors are typically responsible for problem solving and coverage that may involve unexpectedly long or irregular hours. Schedule demands

are thus usually most extreme for lower-level workers, even if such demands do not disappear after rising to management. To the contrary, requirements to relocate become *more* common the higher in management one ascends.

The basic facts about the impact of labor supply on flexibility are unsurprising. One such fact is that in times when and places where qualified labor becomes more scarce, businesses tend to decrease their demands for employer-driven flexibility (both career and schedule) and increase their concessions to worker needs. The other fundamental fact is that businesses such as call centers or stores searching for workers to fill nonstandard (part-time, night, weekend) schedules draw on populations who themselves seek nonstandard schedules due to other life activities: mothers of young children, students, moonlighters. Of course, the messy reality is that labor supply, a given company's strategies for tapping it, and other companies' strategies with respect to the same pool of labor, are all moving targets. Rarely do we see major workplace changes due to pure labor supply shifts. Rather, workers' needs and aspirations, and those of the companies that employ or seek to employ them, interact in complex ways.

Finally, then, we turn to the impact of strategic restructuring. In our case studies, we find two kinds of restructuring trajectories. On the one hand, some restructuring essentially carries out compositional shifts of employment, shifting work from one industry or setting to another without radically changing activities in either setting. Thus, for instance, food preparation shifts from restaurants and cafeterias (where nonstandard and fluctuating schedules are common and career tracks are limited) to food factories (where standard, stable shifts predominate and mobility paths are well developed). Similarly, retailing moves from stores to call centers, where schedules, already extended and variable in the case of stores, are even more extended and variable.

On the other hand, restructuring can involve evolution of organizational structures as initial managerial strategies are implemented and found wanting. In the most dramatic example in our findings, retailers and financial institutions created call centers as very flat organizations in line with then-current managerial predilections for eliminating hierarchies and minute job distinctions. These provided little upward mobility or sometimes offered pay increases but little visible mobility in job titles. In response to workers' preferences for mobility and recognition, firms added levels and career paths. Along the same lines, Monarch and other electronics manufacturers originally outsourced to tiny shops but then grew those shops or, more often, shifted to much larger suppliers—truncating mobility paths but then rebuilding them. And across many industries, businesses professionalized jobs—coupling expanded opportunities for mobility with heightened credential requirements and, in many cases, reduced employee-driven flexibility. Finally, we have seen that managerial discretion can channel, supplement, or subvert companies' strategic restructuring initiatives.

Let us return to our three central claims. All of these findings point to the implications of organizational structure for work-life balance. In this chapter, the evidence for iterative rather than linear restructuring is limited to the evo-

lutionary vignettes summarized in the previous paragraph, but we believe the examples cited are sufficient to make a case for the meandering nature of much restructuring. (In other work [Lane, Moss, Salzman, & Tilly, 2003; Moss, Salzman, & Tilly, 2003], we have detailed additional examples of this exploratory process from our data.) And, both compositional change (in the case of outsourcing of food preparation) and evolutionary restructuring (in the case of call center creation and electronics outsourcing) do appear to often strengthen or rebuild internal labor markets—although there is nothing automatic about this, and we have also observed continuing trends (offshore outsourcing, professionalization) that close off avenues of upward mobility.

Employer-driven patterns, and changes in those patterns, certainly dominate our narratives of schedule and career flexibility. Nonetheless, we found cases of expanded work-life opportunities (as when on-site job ladders reemerged), others where they contracted (as when call centers absorbed functions formerly based in stores, banks, and offices), and still others with mixed effects (as when professionalization offered added full-time opportunities but foreclosed part-time options and more often required relocation for career mobility). Employees were more likely to achieve flexibility on their own terms when and where labor was scarce or when they possessed valuable skills. Our finding of iterative restructuring counsels caution regarding the finality of particular flexibility outcomes.

Having illustrated the usefulness of exploring the work-life consequences of restructuring that is pursued for reasons unrelated to work-life, we would propose extending this line of research in two directions. First, it would be worthwhile to replicate this type of process-focused case study research in several ways. It would be instructive to look at a wider range of work-life outcomes not simply two rather narrowly defined arenas of flexibility. Studying additional industries would be fruitful, as would searches for cases in which work-life objectives actually have motivated restructuring. We did not find such instances, but that may be unsurprising because our chief research focus is the restructuring process itself, rather than work-life issues. Perhaps most important, we urge research on the work-life impacts of a wider range of types of business restructuring. Second, for purposes of generalization, it would be valuable to trace these sorts of changes in large, representative data sets—particularly longitudinal data sets allowing researchers to track schedule changes and career and life course progressions. We hope that continuing exploration of the links between organizational structure—and restructuring—and work-life balance will inform both organizational theory and the work-life interface, strengthening the much-needed bridge between these two areas of inquiry.

AUTHOR NOTE

We thank the Rockefeller, Russell Sage, and Sloan Foundations and the University of Massachusetts—Lowell for financial support. We thank Radha Biswas

for outstanding research assistance and Julia Lane for essential input into co-authored work on which this chapter draws. Thanks also to the editors of this volume and an anonymous reviewer for very constructive feedback on an earlier draft.

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