

Family Leave Workshop

TOOLKIT



FAMILY LEAVE
WORKSHOP

Introduction

Paid family leave is a rapidly growing trend in businesses across the country, allowing employees to be with their families when they're needed most. Leading companies are discovering the tremendous benefits that paid family leave offers to their bottom line—including improved retention, productivity, and competitiveness. This transformation is being led by visionary employees who make the case internally for new policy. This toolkit shows you how they did it.

Bringing paid family leave to your workplace can improve the lives of your colleagues, and is also part of an important national discussion. Ensuring that everyone in the U.S. has access to paid family leave will require national public policy. By bringing paid family leave to your workplace, you can help policymakers understand the best way forward for instituting a strong public policy that works for businesses, families, and our communities.

Thousands of businesses in the U.S. offer paid family leave. PL+US interviewed the people who have led the way—from employees who made the case internally, to CEOs who approved the new policies—to bring you the best practices for bringing paid family leave to your own employer. We know what worked, what didn't, and how to win. In this toolkit, you'll find strategies and tips to help you win paid family leave for your workplace.

What *is* Paid Family Leave?

Paid Family Leave allows employees to take paid leave from work to:

- Address a serious health condition (including pregnancy);
- Care for a family member with a serious health condition; or
- Care for a newborn, newly-adopted child, or newly-placed foster child.

Take a look at our [Paid Leave FAQ page](#) to answer specific policy questions. That's paidleave.us/paidleave_faq.

Are you ready to make a change at your workplace?

Successful advocates shared this advice to help get you started:

- **Anyone can do this: the people who win are the ones who try.** You already have more expertise and power to build your case than you know. The most important thing is to get started.
- **Friends are key.** You're part of a big trend: a lot of people want paid family leave so there are likely others in your workplace who support policy change. You'll be more successful when you get together with one or two other people so that you have a team of voices asking for paid leave.
- **Your path will be unique.** Some employees have gotten a "yes" to policy change after one meeting with a CEO, while others have won policy change only after months of discussion with their HR team. We've gathered recommendations based on what employees tell us is working, but of course you'll need to tailor these to your own workplace.

As part of the Paid Family Leave Workshop, you'll be receiving key tools:

- This Toolkit: including
 - A step-by-step guide to building your case
 - Sample employee stories that personalize the need for paid family leave
 - A sample agenda for presenting your case to HR or your CEO
- A customizable template proposal to present to your company
- A sample slide deck to make a sharp pitch to your HR team or CEO
- [Paid Leave FAQ page](#) that can be shared with HR staff
- Additional reading and useful links

We and your Family Leave Workshop teammates will be with you all the way. Welcome to the workshop!

BEFORE YOUR BEGIN:

Get the facts

Before making your proposal for paid leave, know what the law requires in your state, and what benefits may already be available to you through your employer.

Learn what the law requires

Employers of 50 or more employees are covered by the federal Family and Medical Leave Act (FMLA) and must provide up to 12 weeks of *unpaid* leave for a serious health condition of the employee (including pregnancy, childbirth, and related medical conditions) or the illness of a close family member. Currently, five states offer different paid family leave programs: California, New Jersey, Rhode Island, Washington, New York, and District of Columbia. For specific information about those states' programs, please review [this chart](#). For further information about your rights under the FMLA: Visit [National Partnership for Women and Families](#)

California, Hawaii, New Jersey, New York, Rhode Island and Puerto Rico also require employers to have short term disability insurance.

To find out more about your rights as an employee in general in your state see [A Better Balance: Know Your Rights page](#).

Understand your benefits

Have an initial meeting with HR or your CEO. Think about this meeting as a way to make sure you know the current policy at your company regarding paid or unpaid family leave. This can be a brief meeting to answer a lot of your initial questions, such as:

- What is our company's policy regarding parental leave, medical leave, and family caregiving leave?
- Who would be involved in making a decision to change the policy?
- What information do you need in order to consider changing the policy?

End the meeting with "I'd love to follow-up with you soon," so that they expect to hear from you again about this issue.

BEFORE YOUR BEGIN:

Know your rights¹

Before you embark on the process of requesting paid leave policy change, it's important to understand what laws protect you as an employee.

Understand Your Rights About Speaking Up. If you are worried about risking your job by talking to your boss about paid family leave, see the comprehensive list of rights and protections for all different classifications of employee at the [National Labor Relations Board page](#). Federal law, specifically the National Labor Relations Act (NLRA), generally protects non-supervisor employees' ability to talk about working conditions with your peers. There are also [more useful tips here](#).

If you think you're at risk, please consult a lawyer or a local legal aid clinic. Look for one at the [National Employment Lawyers Association](#), or contact the [Department of Labor National Contact Center](#) for help.

It's good practice to keep a log. Regardless of how good you think your relationship with your HR manager or CEO is, you should document each of your interactions with them when discussing benefits and making a request for paid leave. Keep a log of who you met with, the date, time, persons present, and what was discussed. A good way to do this is to send a follow up email to the person you meet with that summarizes your conversation and next steps.

SUCCESS STORY

Stephanie Ramos from New Jersey is a 29-year-old coach in our Paid Family Workshop. She's excited to help you win policy change. She says, *"I knew if I changed our paid leave policy I could make things better for the families around me right now. Being a small company shouldn't deter anyone from implementing a progressive paid leave policy. Large, small, or startup, if you want to make an impact you can. And you will."*

¹ NOTE: The information provided here does not constitute legal advice. If you have questions about your rights, please consult with an attorney.

A ROADMAP:

Changing your workplace

While the path at each individual company is unique, employees who win policy change follow the same basic steps:

1. Build a small team
2. Powermap: what do you want + who decides?
3. Find people with stories
4. Customize our template proposal + build your case
5. Request a meeting
6. At the meeting: make your case
7. Follow-up + persist!
8. Communicate the win



STEP 1:

Build a Small Team: find 2–3 supporters

Why build a team? Employees have found that building a small team of 2–3 people to work together means that you can:

- **Collaborate.** Together you can lean on each other for support and divvy up the tasks of research and customizing the proposal as you get ready for a meeting with decision-makers. Some teams have edited their proposal by all working together in one document.
- **Show power.** When you meet with HR or the CEO to make your case for paid family leave, having a small team with you will show them that your proposal has support from multiple people.
- **Have more fun!** Some people told us that they formed new friendships from working together on paid leave policy and that their working group is also a source of support.

How to find 2–3 supporters:

- ❑ **Talk to the 3 easiest people first.** Your closest coworker, your team-mates, your manager (if you have the right relationship), or someone who has just come back from a period of leave. The goal of talking with them is to find out what they think about your company’s current leave policy (or lack thereof) and to get a sense of their interest in working with you. Get input by asking and listening.

A few key questions to ask are:

- What do you think of our company’s paid leave policy? Why?
 - What would you like the policy to be?
 - Would you be interested in working with me to change it?
 - Who else do you think I should talk to who might be interested?
- ❑ **Reach out beyond the people you know.** If you’re at a big company: Is there a women’s or parents group that meets? Is there a bulletin board where you can post a note and have people contact you? A group that practices yoga at lunch time where you could make a quick announcement? (“If you’re interested in talking about paid family leave, come talk to me privately afterwards.”) Is there a different group of employees who will be included in the policy who you can reach out to?
 - ❑ **Hold an informal meeting.** Invite people who you’ve spoken with to gather together for a brief coffee/tea break and ask them to share their hopes for paid

family leave in your company; Ask them to join you in working towards your goal; Invite them to create a working group with you and don't leave the first meeting without a set time in the calendar to meet again, perhaps in one week.

- ❑ **Create a working group.** Invite people you've spoken with so far to work with you to develop a proposal and meet with HR (or other decision-makers). Set a regular time to meet—every week or two—and divide up the work into specific roles. If someone wants to be part of the group but can't take on much of the work, figure out a way to include them in the process by having them continue to give input or at least be present when you meet with decision-makers.



Hot tip! Paid Family Leave Workshop participants are encouraged to invite your teammates to join our video training calls. The more people in your working group who can join the calls with you, the better!

STEP 2:

Powermap: What Do You Want + Who Decides?

What paid leave policy do you want? Who at your company will give you the policy change you want? Power-mapping is figuring out who has the power to create change --Maybe it is the CEO, HR director, the Chief of Staff or the Vice President of Operations.

Some employees have won policy change by simply working with an HR manager, while others have presented a plan to their CEO, or worked directly with a CFO and not worked with HR. The path to success will be different at each company.

Powermap questions to answer:

- What are we asking for? (See our Paid Family Leave Q & A for ideas)
- Is our company considering changing our family leave policy?
- Who has the power to make this policy change?
- Who do they listen to?
- What do they care about?
- What are they most proud of about the company?
- Do they have a family? Do they have elderly parents, a spouse, or a child?

If you don't know the answers to these questions, it may be worth having an initial meeting with HR to find out, by asking questions like "have you considered changing the policy, who would we talk to about it, what do you hear from employees about our current policy?"

Draw your pathway to success:

HR Director → cares about: family-friendly company image, employee feedback surveys
 → listens to: CEO, employees, department heads

OR

CEO → cares about: company's bottom-line, competitors
 → listens to: board of directors, Chief Financial Officer

OR

CEO → cares about: company's family-friendly image, recruiting top-notch employees
 → listens to: HR director, VPs

STEP 3:

Find people with stories

CEOs and HR directors have said that in addition to the data and strong case they were presented with, what helped persuade them to develop a good family leave policy was hearing *powerful stories from their employees*.

These stories will come from people you work with who are deeply impacted by the lack of policy. For example, someone who took unpaid time off to care for their dying parent, a father who didn't take any time off after his child was born, or someone who left the company because they wanted to have a family.

FINDING PEOPLE WITH STORIES

Brainstorm with your working group:

- Share your own stories with each other: Why is paid family leave important to you? How has the company's lack of paid family leave impacted you or your family?
- Are there employees you could approach who have taken leave recently, who have had a new baby, who have taken time off to care for a critically ill family member, or taken leave for their own serious illness?
- Are there employees who *left* the company because they wanted to have a family?
- Are there people in different parts of the company, like administrators, people who work in other offices or who work remotely, retail folks, people in other departments, who you could approach to learn their experiences?

ENSURING CONFIDENTIALITY

- Approach these employees individually and in a sensitive, confidential way: ask if you can have a confidential conversation with them about paid family leave policy.
- Look for people who have a diverse range of experiences: caring for aging parents, dealing with a serious illness, as well as the birth of child.
- Ask them to share their story with you: What was their experience? What were the challenges? What do they wish the company paid family leave policy included?

- Ask them to join you in speaking with decision-makers. If your colleague isn't comfortable speaking directly with the decision-maker, get their permission to share it on their behalf. If they're interested in working with you, ask them to join your working group.
- Offer anonymity. Personal experiences are powerful for conveying the true impact of policy, even if people prefer to remain anonymous. Again, it's best if employees can join you to meet with decision-makers and tell their story themselves. If they can't, get their permission to share it on their behalf. If they prefer to be anonymous, ask which details of their story you can share while respecting their privacy.

THE TYPES OF STORIES THAT BUILD THE CASE

You will hear many experiences from your colleagues. These are the types of stories that we've learned have the ability to best convey to decision-makers the need for paid family leave.

- **Pull at the heartstrings** of the listener. Share experiences about caring for a loved one and being present for critical moments like the birth of a new child or the death of a family member.
- **Paint a picture with specific details.** What was it like sitting there with your loved one during a time of crisis? What was the experience of being a new father? Including small details paints a real story and creates personal connection with the listener.
- **Highlight the needs for leave from a diverse selection of people in different roles and parts of the company.** Try to find stories from all types of employees. Try to find stories that are not just about birth moms, which is the group that employers will typically have in mind when they create paid leave policy. Instead, a wide variety of stories will help ensure that your company's policy is developed to meet the needs of all employees for different kinds of needs: medical leave, parental leave, and family caregiving.

SAMPLE STORY

Adoption
/Parental
Leave

My husband and I are in a same-sex marriage and were on a waiting list for years to adopt a child. My company's policy doesn't include adoptive parents, so we didn't have paid leave. When we found out that our newborn daughter was coming to us, we cobbled together vacation and sick days while my husband negotiated an unpaid leave to care for our new baby for 6 weeks. Those first weeks were wonderful, sleepless, and challenging, and we were able to take time with her, but it was hard knowing that my colleagues who are parents had been respected and supported by our company with a paid parental policy that discriminated against my family because we are a little different.

SAMPLE STORY

Family
Caregiving
Leave

My wife and I are in our 60's. Earlier this summer she had a massive stroke. Last month she came home from the hospital and I (who am the only one with a salaried job right now) needed time to help her get settled recovering at home. I took 4 weeks unpaid FMLA. I could have taken up to 12 but I couldn't afford to miss those paychecks. After having our household income cut by two thirds (my wife's salary), I had to take unpaid leave to care for her. It's shameful to put someone at our company in this difficult financial position and to make me choose between work and caring for my wife. Paid family leave policy needs to include ALL family situations, not just child birth.

Now that you've figured out what you want and found supporters and stories, it's time to build your case and propose a policy! The next steps will walk you through getting ready to meet with decision-makers.

Please Note: Workshop participants will receive the template proposal during meeting 2 of the Workshop.

STEP 4:

Customize the proposal & build your case

Start to customize the template proposal. Your powermap should inform how you tailor your message and build your case. Develop a proposal that speaks to your company's values and culture.

For example, if your company is very competitive with others in the industry, focus on how competitors' policies compare. If your company is proud of its team and loyal employees, highlight employee retention and happiness. Customize the template to ensure that the language and data in each section match your company's values and motivations.

Most employees have found that in order to make a strong case for paid family leave, they need a proposal with few key components:

1. **A strong opening and ask on page one.** Busy CEOs want to know immediately why you're meeting and what you're asking for.
2. **Why Statement.** Introduce the concept of paid family leave and why a good policy matters to your company's interests and values.
3. **Employee Testimonials.** People are moved to action because of personal stories more than by facts and figures alone.
4. **Current Policy.** Include your company's current paid family leave policy.
5. **Benchmarking competitor policies.** Provide a comparison of competitors' policies from within your industry or geographic region. Find competitor policies that demonstrate that your company needs to catch up. Cite example policies from competitors within your industry and/or geographic region. Include a larger company if it is difficult to confirm a quality paid family leave policy at another small or mid-sized competitor.
6. **Proposed Policy.** Write out the specific paid family leave policy that you are proposing your company adopt.



Hot tip! Some companies have their policies available online and can be found via a quick search. Policies are also often available on sites such as [Fairy God Boss](#) or [GlassDoor](#). Your HR team may also be able to reach out to other companies to confirm their policies.

At the same time as you're customizing the proposal in Step 4, you can go ahead and request a meeting even if your proposal isn't finished. While you might get something scheduled immediately at a small company, it could take a month or longer to secure time at a larger company.

STEP 5:

Request a meeting

Request another meeting to discuss paid family leave with HR, the CEO, or another key decision-maker you've identified. We're assuming that you've already met with them once for some initial fact-finding, so this meeting shouldn't catch them off-guard. Tell them the topic of the meeting ahead of time. Prepare your agenda and brainstorm questions to ask (see Step 6)!



Hot tip! Request a meeting early in the process. This doesn't need to wait until you're done with all your materials. Even if your proposal is not complete, having an upcoming meeting in the calendar will motivate you to finish.

STEP 6:

At the meeting

Wow, you've made it this far! You've done your research, built your case, and you're ready to make a pitch. Feel free to lean on your Family Leave Workshop teammates to run through your agenda, practice your pitch, or just get some team love and good luck vibes as you take a deep breath, print your materials, and calm any pre-meeting jitters.

When meeting with HR or your CEO to make your case, here are a few tips:

- Prepare an agenda and share it before the meeting.
- Send materials ahead of time.
- Bring others from your working group.
- Do a power pose in the bathroom first, because, why not?
- Focus on telling stories. HR Directors at major companies have told us that what convinced their CEOs to create good policy was hearing powerful stories, not the detailed data. The data and benchmarking chart are important to have, but decision-makers you're meeting with will walk away from the meeting remembering how they felt when they heard stories about employees.



Hot tip! Don't leave the meeting without a follow-up plan. Set a date to meet again or ask how much time the decision-maker needs to get back to you. Clarify next steps together, i.e. *"I'm going to send you a few additional links of good, sample policies, and we'll meet back in 2 weeks on December 1st at noon."*



Even hotter tip! We've created a Sample Slide Deck, which you can use if you'd like to present your case in a powerpoint format. This may make more sense when meeting with a few people, rather than a one-on-one meeting with a decision-maker.

A SAMPLE AGENDA

FOR A 30 MINUTE MEETING

- 10:00–
10:04** **Connect:** If you don't know the person you're meeting with, it's worth spending a few minutes describing your role, how long you've worked there, and sharing something personal like if you have kids or an aging parent, and asking them to tell you a little about their role.
- 10:04–
10:05** **Provide Context:** Say clearly why you are here "I want to discuss our company's paid family leave policy and the proposal I'm making.
- 10:05–
10:10** **Tell Stories:** Explain the need for paid family leave by sharing experiences from people within the company.
- 10:10–
10:15** **Ask:** We want our company to implement a policy that looks like _____. What information do you need to be able to make this decision? What are the strengths and weaknesses you see in this proposal?
- 10:15–
10:20** **Provide evidence.** Show your benchmarking chart and other data you want to highlight to highlight why paid family leave is good for companies. Walk them through any other significant parts of the proposal.
- 10:20–
10:28** **Ask Strong Follow-up Questions and Listen:**
1. There is a major trend of companies providing quality, equal paid family leave policies. What is our company thinking about doing?
 2. If our company were to create a policy, what do you think would be the biggest incentive or factor impacting the decision?
- 10:28–
10:30** **Confirm Specific Next Steps:**
1. Clarify what you'll be discussing next time you meet. Confirm what resources you'll provide or what research they or you will be doing.
 2. Confirm a time: put your next meeting in the calendar before you end this meeting.
 3. Write down their questions and say you'll get back to them by a certain date.

STEP 7:

Follow-up + persist!

It is rare to achieve policy change after the first or second meeting. Know that deciding and writing a new policy may take a few months, depending on the size of your company.

Persistent follow-up and support are often very important to ensuring that your work comes to fruition. Here are a few tips for strong follow-up:

- Confirm specific next steps with the decision-maker, and put them on a calendar. Clarify what further information or research is needed, as well as who is gathering it. Offer to provide resources or help with researching answers to their questions.
- If they aren't proactively following up with you, then pop into their office and ask them again in-person "what are the next steps and can I be of any help providing resources or support on this?"
- Leverage our PL+US Family Leave Workshop tools to troubleshoot any roadblocks: ask your teammates or PL+US staff for support. If an HR person or CEO would like to get in touch directly with another CEO or HR Expert who has gone through this process and has expertise in paid family leave policy, please get in touch with us at PL+US and we can provide contacts for coaching and support.

STEP 8:**Communicate the win** 

You've won! Now what? Make sure that the policy is well-communicated and that employees are presented with the new policy in a variety of formats e.g. through a company email and a presentation.

Assign someone to answer questions confidentially about how the policy works and what the process is when an employee needs to take paid family leave. Some companies develop a protocol for when employees return from a leave.

Here are a few questions to think through:

1. Who does an employee go to when they are in need of leave?
2. Who does a manager go to when their employee approaches them about a need for leave?
3. How can the company support employees upon their return from leave?

Additional Resources

What is good paid family leave policy?

Great paid family leave policies are EQUAL.

Policies should apply equally to all employees (salaried, hourly, full-time, part-time, and subcontractors) and to all parents (birthing mothers as well as fathers, adoptive, foster, those who become parents via surrogacy and all other parents). Note that a great policy does not include outdated distinctions of 'primary' and 'secondary' caregiving that serve to perpetuate gender biases at home and in the workplace. Great family caregiving policies include LGBTQ families and other non-traditional families by [including chosen family in their benefit](#).

Great paid family leave policies provide ADEQUATE TIME.

Policies should meet the needs of new parents, people who need take time to provide family caregiving, and individuals who need time to address their own serious illness. Twelve weeks of paid parental leave and six weeks of family and medical leave is a minimum in order to meet the needs of employees at these critical times.

Great paid family leave policies are ACCESSIBLE.

Policies should be transparent and should be easily accessible for current and prospective employees. Managers should be trained in the policy and be able to explain it accurately to their direct reports. Companies should create a culture in which all employees feel able to use paid family leave fully, and ensure that no employee fears retaliation if and when taking leave.

Examples of good paid family leave

1. [PL+US policy for PL+US employees](#)
2. [Bank of America](#)
3. [Deloitte](#)
4. [Etsy](#)

Learn more about paid family leave

Paid Leave facts:

- [The Arc: Paid Family and Medical Leave](#)
- [National Partnership for Women and Families: Paid Leave Fact Sheets](#)

Understanding the difference between Paid Family Leave and Sick Days:

- [Center for American Progress: Paid Leave 101](#)

The case for paternity leave:

- [Chicago Tribune: Paternity leave is key to building a family](#)

Case for Paid Family Leave:

- [Department of Labor Report: The Cost of Doing Nothing](#)

More examples of stories:

- [The Arc: Paid Leave Story Handout](#)

Designing Inclusive Paid Family Leave:

- [Center for American Progress: Inclusive Paid Leave: Chosen Family](#)

PAID FAMILY LEAVE TOOLKIT

We've compiled answers to the most common questions in our [Paid Leave FAQ page](#). If you have a question that isn't answered, please contact us at workshop@paidleave.us



PLUS

The logo for Family Leave Workshop, featuring the text "FAMILY LEAVE" in a small font above "WORKSHOP" in a larger, bold font. Below "WORKSHOP" are three horizontal lines of varying lengths, resembling a stylized American flag.