

# Paid Family Leave

## TOOLKIT



FAMILY LEAVE  
**WORKSHOP**

## Introduction

Paid family leave is a rapidly growing trend in businesses across the country, allowing employees to be with family when they're needed most. These leading companies are discovering the tremendous benefits that paid family leave offers to their bottom line—including improved retention, productivity, and competitiveness. Most of 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 employer can not only improve the lives of your colleagues, it 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 great public policy that works for businesses, families, and our communities.

Thousands of businesses in the U.S. offer paid family leave. PL+US has interviewed the people who have led the way—from employees who made the case to CEOs who approved the new policies—to bring you the best practices for changing workplace paid family leave policy. In this toolkit, you'll find the strategies and tips to help you win paid family leave at your own workplace.

### **What *is* Paid Family Leave?**

Paid Family Leave allows employees to continue to earn their pay while they take time away 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.

## Are you ready to make a change at your workplace?

Here are a few things we heard from successful advocates to consider as you get 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; paid family leave is currently ranked as the most popular employee benefit<sup>1</sup> so there are likely others in your workplace who support policy change. You'll be more successful when you connect with one or a few other employees to have a team of voices asking for paid leave.
- **Your path will be unique.** Be patient and persistent. 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 have told us works, 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
- Implementing Paid Family Leave Policy Q & A which can be shared with HR staff
- Additional Reading and Useful Links

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<sup>1</sup> <https://www.benefitnews.com/news/flexible-work-options-most-popular-benefit>

## BEFORE YOU BEGIN:

# Understand your benefits

Before making any proposal for paid leave, know what benefits are available through your employer's contributions and through your state.

## Know what you're entitled to legally.

Employers of 50 or more 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](#)

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

**Have an initial meeting with HR or your CEO.** This will help make sure you know the current policy at your company regarding paid or unpaid family leave. This can be a brief meeting to get lots of your questions answered.

- 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 would you want to know 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 YOU BEGIN:

# Know your rights

Before you embark on the process of requesting paid leave policy change, it's important to understand what laws protect you as an employee.<sup>2</sup>

**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 was 29 years old when she successfully advocated for a paid family leave policy in her small workplace of less than 50 employees. 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."*

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<sup>2</sup> NOTE: The legal 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. Communicating the win



YOU CAN WIN THIS

## 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.** You can divide up the tasks of researching and customizing the proposal as you prepare for 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 this is a need that's echoed by multiple people.
- **Support each other.** You can lean on each other for support if you encounter roadblocks or challenges, and some people told us that they formed new friendships from working together on paid leave policy at their workplace.

How to find 2–3 supporters:

- ❑ **Talk to the 3 easiest people first.** Ready supporters might include your closest coworkers, your teammates, your manager (if you have a supportive 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:**
  - 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, several useful questions to note are: Is there a women's or parents' group that meets regularly? Is there a bulletin board where you can post a note and have people contact you? Is there a social group that meets at lunch 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 would be affected by the policy you can reach out to?



- ❑ **Hold an informal meeting.** Invite people 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 within 1-2 weeks.
  
- ❑ **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, invite them to offer input or be present when you meet with decision-makers.



**Hot tip!** You and your teammates are encouraged to join one of our Paid Family Leave workshop webinars. The more people in your working group who can join the calls with you, the better!

## STEP 2:

# Power Map: What Do You Want + Who Decides?

What paid leave policy do you want? Who at your company can 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 some have presented to their CEO or worked directly with a CFO and not worked with HR. The path towards success will be different at each company.

### Power map 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 regarding 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. Ask 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 good family leave policy was hearing *powerful stories from their employees*.

These stories will come from people you work with who have been deeply impacted by lack of paid family leave: someone who took unpaid time off to care for their dying parent, a father who wasn't able to 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 remotely, retail staff, or in other departments, you could approach to hear about their experiences?

### ENSURING CONFIDENTIALITY

- Approach these employees individually and 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 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. While it's best if employees can join you to meet with decision-makers and tell their story themselves, ask if they'll permit you to share it on their behalf if they choose not to attend. 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. A compelling story is less about the dates/timeline/facts and more about walking through the experience with the storyteller. Stories that include specific and vivid details, describe the emotional impact, and show a diverse range of experiences often have the ability to best express to decision-makers the important need for paid family leave.

- **Paint a picture with specific details.** What was it like sitting there with your loved one during a time of crisis? What was most memorable from those first days of being a new parent? Including vivid details paints a picture with words and invites others to imagine themselves in that experience.
- **Describe the emotional impact.** How did the experience of caring for a critically ill family member impact you? What did it mean for you to return to work before you were ready following the birth of your child? How did your experiences affect you, or make you feel or think differently?
- **Highlight stories from a diverse selection of people in different roles and parts of the company.** Try to find stories from all types of employees. Employers will typically think about birth moms when they create paid leave policy, so having 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 had been on a waiting list for years to adopt a child. My company's policy doesn't include adoptive parents, so when we found out that our newborn daughter was arriving, I 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. It was hard knowing that my colleagues who are also 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 needed time to help her get settled recovering at home. As I was now the sole person with a salaried job, I only took 4 weeks unpaid FMLA. I could have taken up to 12 weeks but I couldn't afford to miss those paychecks since we just had our household income cut by two thirds by the loss of my wife's salary. It's shameful to put someone at our company in this difficult financial position, where I am being made to choose between work and caring for my wife. Paid family leave needs to include ALL family situations, not just childbirth.

Now that you've figured out what you want, 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.

## STEP 4:

# Customize the proposal & build your case

With your small team or another person, start to customize the template proposal. Your power map 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 very competitive with others in the industry, focus on how competitors' policies compare. If your company proud of its team and loyal employees, highlight employee retention and happiness. You can customize this 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 the following key components:

1. **A Strong Opening and Ask On Page One.** Busy CEOs want to know immediately on page 1 why you're meeting and what you're asking for.
2. **Why Statement.** Introduce paid family leave and why a good policy matters to your company's interests and values.
3. **Employee Testimonials.** People are often moved to action because personal stories are more powerful than just 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. 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 on their website. 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 find their policies.

**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. While you might get something scheduled immediately at a small company, it could take a month or longer to secure a meeting time at a larger company. 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!

In preparation for the meeting with HR or your CEO, 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.
- Focus on telling stories. (HR Directors at major companies have told us that what swayed their CEOs to create good policy was hearing powerful stories. 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 several people, rather than a one-on-one meeting with a decision-maker.



## A SAMPLE AGENDA

FOR A 30 MINUTE MEETING

- |                         |   |
|-------------------------|---|
| <b>10:00–<br/>10:04</b> | <b>Connect:</b> 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.   |
| <b>10:04–<br/>10:05</b> | <b>Provide context:</b> Say clearly why you are here: "I want to discuss our company's paid family leave policy and the proposal I'm making."   |
| <b>10:05–<br/>10:10</b> | <b>Tell stories:</b> explain the need for paid family leave by sharing experiences from people within the company.  |
| <b>10:10–<br/>10:15</b> | <b>Ask:</b> 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?   |
| <b>10:15–<br/>10:20</b> | <b>Provide evidence.</b> Show your benchmarking chart and other data you want to highlight to show why paid family leave is good for companies. Walk them through any other significant parts of the proposal.  |
| <b>10:20–<br/>10:28</b> | <b>Ask strong follow-up questions and listen:</b> <ol style="list-style-type: none"> <li>1. There is a major trend of companies providing quality, equal paid family leave policies. What is our company thinking about doing?</li> <li>2. If our company were to create a policy, what do you think would be the biggest incentive or factor impacting the decision?</li> </ol>  |
| <b>10:28–<br/>10:30</b> | <b>Confirm specific next steps:</b> <ol style="list-style-type: none"> <li>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 responsible for.</li> <li>2. Confirm a time and schedule your next meeting in the calendar before you end this meeting.</li> <li>3. Write down their questions and say you'll get back to them by a certain date.</li> </ol> |

## 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 with the decision-maker the specific next steps 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, drop by their office and ask them again in-person, "What are the next steps and how can I be of help providing resources or support on this?"
- Leverage our PL+US Family Leave Workshop tools, such as joining one of our Workshop webinars, signing up for individual coaching, or receiving peer support from our private Facebook group. If your CEO or HR would like to get in touch directly with another CEO or HR expert who has successfully gone through this process implementing a paid family leave policy at their workplace, please get in touch with us at PL+US and we can connect them to one of our expert coaches.

**STEP 8:**

## Communicating the win

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

There should be someone assigned 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 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

[PL+US](#)

[Bank of America](#)

[Deloitte](#)

[Etsy](#)

## Learn more about paid family leave

### **The Case for Paid Family Leave:**

- [Department of Labor Report: The Cost of Doing Nothing](#)
- [New America: Paid Family Leave: How Much Time is Enough?](#)

### **Understanding the difference between Paid Family Leave and Sick Days:**

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

### **Designing Inclusive Paid Family Leave:**

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

## PAID FAMILY LEAVE TOOLKIT

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



PLUS

The logo for Family Leave Workshop, featuring the text "FAMILY LEAVE WORKSHOP" in a bold, sans-serif font. The word "WORKSHOP" is larger and more prominent. Below the text are three horizontal lines of varying lengths, resembling a stylized graphic or a set of steps.