



FLEX-OPTIONS GUIDE

*Creating 21st Century
Workplace Flexibility*

April 2009

U.S. Department of Labor, Women's Bureau

www.flexoptions.org

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The Flex-Options editorial staff is solely responsible for its content.

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Welcome to the Flex-Options Guide!

The U.S. Department of Labor, Women's Bureau, promotes 21st Century solutions to improve the status of working women and their families. We are committed to helping America's working women achieve: *Better Jobs! Better Earnings! Better Living!*

In late 2003, the Women's Bureau launched Flex-Options to focus on helping women business owners create more flexible workplaces, providing them with online resources and opportunities to participate in peer mentoring, networking, national teleconferences, discussion groups, and flexibility workshops. Over time, the project expanded to offer these resources to all types of organizations.

Across the U.S., companies are realizing that workplace flexibility can help them address today's most pressing issues in keeping employees engaged; offering options in lieu of layoffs during tough economic times; planning for emergencies such as natural disasters, pandemics and other crisis situations; and contributing to environmental sustainability by decreasing one's carbon footprint.

To date, we have worked with more than **800 organizations**, that employ nearly **1.1 million people**, helping them create more flexible workplaces. Each of these employers has implemented or enhanced their flexible work guidelines, programs and practices. In total, they have launched nearly **2,000 workplace flexibility practices**. Additionally, we've joined business leaders across the U.S. to host more than **400 flexibility workshops** and events. Our bi-monthly teleconferences have drawn **4,500 participants** from nearly all 50 states and our Website receives nearly **20,000 hits** each month.

The Women's Bureau would like to express its sincere appreciation to our Flex-Options national contractors – Karen Kerrigan, Women Entrepreneurs Inc. and Linda Roundtree, Roundtree Consulting LLC – who have brought the challenges and issues together in this Guide to make it possible for other employers to have the tools to implement or enhance flexibility in their workplaces without reinventing the wheel.

Please visit the Flex-Options Website at www.flexoptions.org. If you have any questions or want to learn more about the project, you may also contact the Women's Bureau by phone at (202) 693-6710 or by email at womensbureaunetwork@dol.gov.

Thank you and enjoy the Guide!

The Women's Bureau Team

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INTRODUCTION

What Is the Flex-Options Project?

Flex-Options is a national workplace flexibility project developed by the U.S. Department of Labor, Women's Bureau, in 2003. The goals of the project are to:

- Build national awareness of the benefits of flexible workplace solutions
- Encourage business leaders to develop or expand workplace flexibility practices, policies and programs

Our definition of workplace flexibility encompasses the full range of options that offer ongoing benefits to organizations, employees and communities:

- Scheduling of Hours (e.g., flextime, compressed work weeks, shift flexibility)
- Amount of Hours (e.g., part-time, job sharing)
- Place of Work (e.g., telecommuting, seasonal relocation)
- Management of Time (e.g., meeting-free flexibility, report late)
- Organization of Career (e.g., off- and on-ramps, leaves of absence)
- Other Time Off (e.g., personal days, floating holidays, vacation buying)

The Flex-Options project is unique in its focus on connecting business leaders interested in workplace flexibility with business owners, managers, HR professionals, and entrepreneurs who have experience in creating flexible workplaces and who are interested in mentoring their peers. For participants, the scope of the project offers a unique combination of resources that enables sharing of successes, challenges and best practices, including:

- **One-on-One Mentoring** with experienced business owners and corporate executives who have created successful flexible workplaces
- **National Teleconferences** featuring presentations by flexibility experts and business leaders, along with Q&A sessions
- **Discussion Groups** offering an opportunity to participate in lively information and best practices sharing sessions with peers, facilitated by flexibility experts
- **Local and Regional Events** with networking, panel presentations, case study workshops, and best practices sharing
- **Web Resources** on www.flexoptions.org including flexibility tools (for employees and managers), articles, teleconference transcripts, and best practices

The Business Case for Flex-Options

Business owners and managers realize that sustaining a flexible workplace is critical to business success for many reasons:

- Supports employees' work-life effectiveness and helps enable them to be the best they can be both on and off the job
- Helps their firms stay competitive in attracting the emerging workforce (including new grads and older workers) and retaining quality employees
- Helps organizations and individuals reduce their carbon footprint
- Provides a tool that can be used in a variety of ways during tough economic times – to offer an alternative to layoffs, to reduce one's commute and fuel expense, and to help keep employees engaged and committed as the business focus changes and budgets are tightened
- Contributes to contingency planning for natural disasters, pandemics, and other crisis situations

In leading companies, flexibility is no longer merely about accommodating highly valued talent. Business leaders are learning how to position flexibility as a powerful management tool used to accomplish work more efficiently, while caring about the needs of employees and bringing strategic value to the organization. When most successful, flexibility becomes an everyday part of the organization's culture, where employees and managers discover a variety of creative ways to schedule and accomplish work.

As employees everywhere strive to juggle all of their commitments, workplace flexibility has hit prime time with flexible work arrangements (e.g., flextime, compressed workweek, part-time, job sharing, and telecommuting, etc.), informal ad hoc flexible options, shift flexibility, and flexibility that enables career breaks. In the most advanced stage, workplace flexibility becomes a part of the culture and "the way we work."

Every five years, the Families and Work Institute (www.familiesandwork.org) conducts its National Study of the Changing Workforce. Key findings about flexibility from the most recent study clearly demonstrate that employees who have more access to flexible work arrangements (formal programs or management's discretionary policies) are more:

- Satisfied with their jobs
- Committed and loyal to their employers
- Willing to work hard to help their employers succeed

- Likely to stay with their employers

Getting Started

How do you go about implementing workplace flexibility? Where do you go to learn about creating a flexible workplace culture, or developing policies and procedures? Will those who have paved the way share their experiences? The U.S. Department of Labor, Women's Bureau, launched Flex-Options to help business leaders across the nation develop and implement flexible workplace solutions. By offering mentoring and networking opportunities, as well as teleconferences and Web site resources, participants have access to the tools and encouragement they need to design flexible workplaces. This Flex-Options Guide is another resource funded by the Women's Bureau to help reach these goals.

"The **City of Atlanta's** partnership with the Women's Bureau on Flex-Options provides a wonderful opportunity to address important and relevant socio-economic issues with low cost, quick turn-around solutions that are a win-win for the city, its employers and its labor force."

~ Honorable Shirley Franklin, Mayor, City of Atlanta

FLEXIBILITY DEFINITIONS, BENEFITS AND COMMON APPROACHES

This section provides an overview of various types of workplace flexibility (flextime, compressed workweek, job sharing, part-time work, telecommuting, and other time-off flexibility), potential benefits to employees and employers, and practical examples.

Flextime

Definition

Workday start and end times differ from the workgroup's standard, yet the same number of hours per day is maintained.

Potential Benefits

- Improves efficiency if work schedules match employees' most productive hours
- Gives employees more control over scheduling personal responsibilities on either end of the workday
- Allows commute outside of peak rush hour

Examples of Common Approaches

- **Core hours:** Established range of time when everyone must be at work with flexibility on either end of the workday. For example, core hours are from 9:30 a.m. to 2 p.m., but employees may start as early as 7 a.m. or leave as late as 6 p.m.
- **Daily flex:** Regular daily schedule that varies from the standard, such as working from 9:30 a.m. to 6 p.m. instead of 8:30 a.m. to 5 p.m.
- **Variable flex:** Ability to take time off during the workday to attend a school function, doctor's appointment, etc. and make up the time on either end of the workday or later in the week or pay period
- **Summer time flex:** Work hours differ during the summer months. For example, starting work at 7 a.m. instead of 8:30 a.m.
- **Day-of-the-week flex:** Work hours are flexed on a particular day of the week, such as Fridays

Model Practice

D.W. Mail, LLC, a mailing services company with 20 employees, surveyed staff asking what work hours were most desirable. As a result of employee input, the company implemented summer hours enabling employees to choose to start work at 6:00 a.m. or 7:00 a.m. They also implemented an additional paid break during the summer for a total of three breaks (two 15-minute and one 10-minute). This enabled employees to have additional down time away from the heat in the warehouse.

Compressed Workweek

Definition

Full-time options that enable employees to work longer days for part of a week or pay period in exchange for shorter days or a day off during that week or pay period.

Potential Benefits

- Improves productivity if some work can best be accomplished during quieter times of the day
- Provides more days off
- Decreases number of days employees commute
- Allows commute outside of peak rush hour

Examples of Common Approaches

- *4-day workweek* (also called 4/10): 10-hour days
- *3-day workweek* (also called 3/12): 12-hour days
- *4½-day workweek*: Four 9-hour days and one 4-hour day per week
- *9-day biweekly* (also called 9/80): Working 80 hours in 9 days (typically 8 days at 9 hours and 1 day at 8 hours) and taking the 10th day off. Be sure to check federal/state overtime laws when implementing this option.

Model Practice

Dow Corning Corporation has implemented innovative compressed workweek options. The company learned that many employees desire a compressed schedule only during the summer, allowing them more days off when their children are out of school. The rest of the year, they prefer the shorter 8-hour workdays to better align with their children's school schedules. So, managers and employees designed a system giving everyone the option of (1) selecting a particular compressed schedule and (2) working it only during the summer months.

For their customer service group, coming up with schedules to accommodate weekly or bi-weekly compressed schedules was more difficult due to their call center function and operational hours of Monday to Friday, 8 to 5. While predictable, standard hours with access to flextime worked for most of the team, what many wanted was an occasional extra day off to take care of family responsibilities. So, the teams developed a year-round schedule that allows employees to take every fourth Friday off.

Part-Time Work

Definition

Working fewer than 35 hours a week.

Potential Benefits

- Retains employees who need to scale back work hours to manage family situations or other personal needs
- Expands labor pool (e.g., retirees, students, persons with disabilities)
- Gives employees time off for education purposes – to complete a degree or take continuing education courses
- Provides option for a gradual return to work after maternity or other leaves
- Allows gradual entry into retirement
- Offers an alternative to layoffs

Examples of Common Approaches

- 80% of full-time (32 hours/week)
- 60% of full-time (24 hours/week)
- 50% of full-time (20 hours/week)

Model Practice

The Business Talent Group, a firm that delivers consulting, project and interim executive talent, has built its business model around the desire of businesses for highly-skilled workers to deliver excellent results on temporary projects, and the intense demand for more job flexibility among highly-skilled and educated workers. "We have relationships with very talented individuals who want the flexibility of alternative schedules and the professional challenge of a complex project. Businesses find they can quickly fill the need for specific, short-term projects with an incredible team by tapping our services," said Jody Greenstone Miller, founder and CEO of The Business Talent Group.

Depending on the project, staff may work several full-time weeks and then take the next few weeks off, or someone might choose to share a project with a partner and work half-time. This flexibility of time and schedule results in highly loyal and productive professionals – a perfect solution for businesses that want a successful way to staff up and down according to business demand.

Job Sharing

Definition

Full-time position shared by two people, each working part-time hours.

Potential Benefits

In addition to the potential benefits of working part-time, job sharing also:

- Brings broader range of knowledge, skills and experiences to a position
- Provides cross-training and skill enhancement opportunities for each partner
- Allows continuity of coverage when one partner is sick, on leave or on vacation
- Provides an option for employees who want to reduce their hours, but whose jobs cannot be accomplished on a part-time basis
- Offers an alternative to layoffs

Examples of Common Approaches

- *Alternate weeks*: Each working one week on, one week off
- *Share workdays*: Each working 4 hours
- *Overlap schedules*: Each working 2½ days a week with a Wednesday overlap

Model Practice

The Boppy Company, manufacturer of the award-winning infant support "boppy pillow," offers a variety of flexible arrangements to its 22 employees. Founder Susan Brown said, "We like to reward our employees with options that work for us and them. We have found with all positions that the self-directed, resourceful employees are easy to manage in non-traditional work arrangements. We also believe happy employees are the most productive."

When two sales employees, both new moms, approached Susan with a job sharing proposal, she eagerly implemented the arrangement. The employees were looking for a way to continue employment, yet spend more time with their newborns. To provide the best customer service, the employees decided to share the customer base and clients. Each works 24 hours a week, covering different days of the week, but with a one-day overlap. Customer satisfaction remains high with no negative impact on efficiency of services.

Telecommuting

Definition

Working from a remote office location one or more days a week.

Potential Benefits

- Expands recruitment pool geographically
- Offers alternative to relocation
- Reduces office space and associated costs
- Can help accommodate employees with disabilities
- Helps reduce organizational and individual carbon footprints
- Decreases wear and tear of transportation infrastructure
- Reduces or eliminates commute
- Provides a work environment with fewer distractions
- Facilitates ability to work during "personal best time"
- Decreases employee work-related spending (e.g., fuel, business clothing, meals)

Examples of Common Approaches

- *Home office*: Designated office space at employee's home
- *Satellite or neighborhood office*: Remote office established by one or more employers, typically in a community with a large concentration of employees
- *Hoteling*: Designated shared workspaces at a company location are reserved by employees who work remotely, but occasionally come into the office
- *Traveling*: Working primarily on the road or at client locations

Model Practice

McKesson Health Solutions is a clinical services group with more than 800 employees, primarily Registered Nurses who provide inbound telephone triage and outbound disease management services. In 2003, McKesson implemented a Work-at-Home program. By 2007, 85 percent of employees were working from home full-time. As a result of the WAH program, McKesson has realized a significant number of benefits and savings of \$4 million a year:

- Higher morale
- Productivity improvements through work and scheduling efficiencies: savings of \$1 million
 - 20 percent of work-at-home staff voluntarily work split shifts
 - 1,500 hours per month moved from overstaffed to understaffed times of day
- Reduction of leased space: savings of \$2 million
 - Three facilities closed
 - Consolidated space in two facilities
- Recruitment and retention improvements: savings of \$1 million
 - Increased labor pool
 - Market-bearing work-at-home labor rate
 - Prior to work-at-home, attrition was 37 percent; current work-at-home attrition is 20 percent

Other Time-Off Flexibility

Definition

A wide range of flexibility enabling time away from work or creating uninterrupted time during the workday.

Potential Benefits

- Provides options for employees to take limited or extended time off from work to manage various family and personal situations, volunteer in the community, take a longer vacation or career break, etc.
- Creates “quiet time” during the workday for catching up on projects (e.g., meeting-free flexibility options)

Examples of Common Approaches

- *Personal days*: Fixed number of days off with pay for personal reasons (Organizations may specifically designate a number of days/hours for volunteer work or attendance at school activities)
- *Paid time off (PTO) banks*: One bank of time off for sick leave, vacations, emergencies, and other personal reasons
- *Leaves of absence*: Extended paid or unpaid time off for maternity, paternity, adoption, education, volunteer work, etc.
- *Phase-back*: Ability to return from a leave of absence gradually by working fewer days or hours and ramping back up to full-time
- *Sabbaticals*: Paid or unpaid time off (typically 1 to 6 months) for personal renewal or volunteering offered to employees after a specified length of service.
- *Flex Year*: Work full-time for part of a year and then take a leave of absence or work reduced hours for the remainder of the year
- *Emergency flexibility*: Fixed number of days off with pay for emergencies; organizations may allow time to be taken in hourly increments
- *Report late*: Ability to report late to work and make up the time at the end of the workday

- ***Vacation buying:*** Allow employees to pay for a specified number of additional vacation days each year
- ***Vacation borrowing:*** Allow employees to borrow one or more weeks of vacation from the following year
- ***Vacation sharing:*** Allow employees to give their vacation days to another employee who needs additional paid time off due to an illness or other personal situation
- ***Day-at-a-time vacation:*** Allow employees to take mini-vacations instead of using one full week or more
- ***Floating holidays:*** For businesses that are open on holidays, allow employees to work on the holiday at regular pay and take another day off of their choosing
- ***Shift flexibility:*** Allow employees to work with co-workers to adjust their schedules by trading, dropping or picking up shifts
- ***Meeting-free flexibility:*** Establish blocks of time by workgroup, division or organization-wide when no meetings are scheduled. Examples include:
 - ***No meeting hours:*** Designate one hour each day as "quiet time" when no meetings are scheduled and when employees are encouraged to work individually without interrupting coworkers
 - ***No meetings days:*** Select one day a week when no meetings are scheduled
 - ***No meetings weeks:*** Select one week or more each year when no meetings are scheduled
- ***Career flexibility:*** Offer opportunities for employees to customize their career paths including “off-ramping” and “on-ramping” at various points throughout their careers. Off-ramping might involve taking a leave of absence, scaling back work hours, taking on a job without travel requirements, or stepping down from supervisory responsibilities. During a leave, employees may stay connected to the workplace by receiving email communications, attending training programs, participating in workgroup meetings, etc.

Model Practice

Accenture, a global management consulting, technology services and outsourcing firm, piloted and implemented an innovative program in the U.S. called *Future Leave*. This program resembles a self-funded sabbatical and enables an employee to step off and back onto their career path (at their discretion and for up to 3 months a year) periodically throughout their career.

An employee decides that he or she needs time away at a predetermined point in the future - whether for self improvement, personal rejuvenation, participating in an environmental cause, a favorite charity, helping an aging parent, or spending more time with children. Any reason is valid for program participation and the reason does not need to be disclosed when requesting the leave.

Here's one example of how it might work. An employee works full-time for an agreed upon time, such as ten months. During this time, the employee receives a percentage of full pay each month, perhaps 80 to 95 percent, while directing the remaining 5 percent to 20 percent into a bank account under the employee's name. After working for ten months, the employee takes two or three months off and receives the banked pay during this time. The program was formalized as policy in 2007, is available to all U.S. employees, and continues to receive excellent feedback.

MODEL PRACTICES IN FLEXIBILITY

...LESSONS LEARNED IN FLEX-OPTIONS

Knowledge and wisdom shared by the nation's leading authorities on flexibility through the Flex-Options national teleconferences, roundtables and regional workshops, as well as experiences shared by business leaders participating in the program, have provided a wealth of information related to best practices in creating more flexible workplaces. The following are just some examples of lessons learned. Complete transcripts of all of our Flex-Options teleconferences are online at <http://www.we-inc.org/2071-150.html>.

Flexibility 24/7

Staffing a 24/7 operation is challenging in any industry, and particularly so if you provide critical emergency services. In 2001, the Communications Center at the **San Diego Sheriff's office** was struggling with losing valued employees, in part due to a lack of workplace flexibility. In response, the center introduced a new shift system.

Dispatchers can choose from a four-day work week or a standard five-day work week. Nearly 75 percent of the staff choose the four-day schedule consisting of two 12-hour days and two 8-hour days, followed by three consecutive days off. A new shift starts every four hours, allowing managers to schedule shifts based on the changing demand for services.

When given a choice about when to start work, many opt for the night shift, or another shift that begins at 3:00 a.m. A major benefit to the four-day work week option has been the reduction in the amount of overtime the agency pays to employees, and the number of mandatory overtime days that employees may be required to work. The center keeps a log of those who are interested in overtime and will call them first when a need arises. The center also allows for part-time employment, teleworking and flexible start and stop times for administrative staff.

"Avoiding rigid schedules has been a win-win from every angle," observed Gail Larsen, Communications Coordinator for the San Diego County Sheriff's Department. "The County saves money on services, the public gets higher quality service and our employees are more likely to stay with us over the long haul," she concludes. (*Flex-Options Region 9, Model Practice Employer, November 2008*)

Making Flexibility Work

Several years ago, Seattle area-based Studio 904 Salon and Spa was suffering high absenteeism and a drop in revenues at both locations. The studio was regularly forced to call customers at the last minute to cancel their appointments. The situation created stress for employee teams and Studio 904's management. Employees were surveyed to understand their challenges and identify preferred work schedules. Customers were surveyed to identify the days and times they preferred to schedule appointments.

In response to the feedback, the studio implemented flexible work schedules and negotiated with employees to schedule 80 percent of their preferred hours in return for them working some evening hours to accommodate customer needs. The studio's doors were open on Sunday, which gave employees another opportunity to work daytime hours. They offered generous customer discounts during unpopular times to drive business into those slots. The studio cross-trained stylists and spa specialist teams to ensure coverage and continued high quality services.

The end result has been a win for employees, happy customers, a reduction in absenteeism, and increased business for Studio 904.

(Flex-Options Region 10, Model Practice Employer, December 2008)

Flexible Downsizing as an Option

In tough economic times, many employers look to cut labor costs first. During this current recession, however, some businesses are using creative approaches to keep as many of their employees as possible. Cali Williams Yost, CEO and Founder of Work+Life Inc., reports that smart firms are employing the strategic use of flexibility. For example, Yost has tracked firms that are taking the following approaches:

- Adding unpaid vacation days to the calendar year
- Closing the office every other Friday
- Shutting down operations during the slowest month
- Shifting and reducing operating hours to peak customer hours
- Reducing pay or schedules across-the-board
- Asking for volunteers to reduce their schedules, share jobs or move to a contract-based status

- Offering sabbaticals and furloughs for as little as two weeks or as long as three months

According to Yost, moving beyond the cut-oriented model traditionally used in economic downturns will help firms emerge from the recession stronger and more competitive.

(Flex-Options Resource: "Using Flexibility as Part of a Downsizing Strategy," February 12, 2009, National Teleconference.)

Customized Work Environments at REI

The outdoor and apparel retailer and manufacturer REI is driven by values that include work-life balance and a commitment to the environment. "Customized work environments" at REI allow the company to "walk the talk" as these work arrangements provide additional outdoor recreational time for employees and quality time with their families.

The customized schedule includes options such as off-peak hours, job sharing, telework and compressed work weeks. Employees select from a menu of various options based on their job responsibilities and personal needs. How does this all work?

- Managers evaluate positions that report to them to determine which flex options are a good fit for these positions
- Since the company starts with the notion that all flexible options are on the table, the manager must justify why an option should be taken off the table
- Based on options that are available, employees evaluate the needs of their jobs, as well as their personal needs
- Employees put together their business plan, which is reviewed by their manager
- Finally, the work team comes together to review everyone's plans to see if there are any gaps in terms of service or coverage; they work out any issues ahead of time

The work teams at REI are empowered to create their own solutions. To accommodate changes in individual employee or company needs these work plans remain open for revision.

(Flex-Options Resource: "Generation Y...What Do They Really Want When it Comes to Workplace Flexibility," June 19, 2008, National Teleconference.)

Telework Best Practices: The Basics

According to Elham Shirazi, a leading expert in transportation planning and telework, organizations that have successful telecommuting programs share certain attributes in how they implement and maintain such programs.

These include:

- Consensus within the organization regarding commitment, as well as specific policies governing the use of telecommuting
- Pilots to assess the jobs and types of employees that are a correct fit for telecommuting
- Training to properly implement the program from the start and regular evaluation to improve it
- Technology – the right IT structure and infrastructure to make it work seamlessly

(Flex-Options Resource: "Telework Trends and Best Practices: How Today's Economic and Environmental Factors are Influencing Telework Options," December 18, 2008, National Teleconference.)

Managing Telework: Communications Tips

According to Kathy Durfee, CEO of **Tech House**, a business and technology solutions company, making telecommuting work requires commitment from the very top. In addition, communication is critically important.

Most of Tech House's nine employees telecommute. To ensure that the team supports each other during the day, without being disruptive, Durfee has developed a system for communication between team members to fully enable the company's virtual model.

Here is the standard followed by all Tech House employees:

- **Not Urgent.** If the information that is needed from a fellow team member is not urgent, it is acceptable to respond by email within a day
- **Somewhat Urgent.** If the request is somewhat urgent, team members use instant messenger

- **Urgent.** These matters trigger a phone call. If one team member phones, the other always picks up. (Even if a team member is with a client, the expectation is that the matter must be truly urgent.)

The company is entirely virtual, and team members are required to come into the office once a month. There is a brief teleconference every morning, and a more significant call once a month. Having such systems and expectations in place makes telecommuting work at Tech House.

(Flex-Options Resource: "Telework Trends and Best Practices: How Today's Economic and Environmental Factors are Influencing Telework Options," December 18, 2008, National Teleconference.)

Hiring for Flexibility

The CEO of **Infrasafe, Inc.**, a global security technology integrator with 100 employees, believes the key to making a flex policy work is hiring the right people. Infrasafe's Todd Flemming says that workplace flexibility is so ingrained within the culture at his company that the interview process vets individuals for being able to work at home, as well as in a team environment.

Like other good companies that have effective flexible arrangements, Infrasafe has policies and a process that everyone follows. Infrasafe's "Work-at-Home" policy first requires the employee to request a work-at-home arrangement. Next, the managers assess whether it will work for the employee. According to Flemming, a variety of employees work at home, including: accounting staff, software engineers and even technical support people. The work-at-home employee is aided by virtual private networks and an IP phone network (using voice over IP technologies as opposed to the public telephone network) that works through the company's main phone system.

Sometimes, having a large number of employees working on a flexible basis offers challenges. However, according to Flemming "to keep and retain the very best employees, we really have to be flexible and allow them to go on with their lives and integrate their work environment with their lives." Flemming adds that the company always focuses heavily on actual results, not face time.

(Flex-Options Resource: "Innovative Workplace Practices: Taking Flexibility to the Next Level," February 14, 2008, National Teleconference.)

4/10 is "Working 4 Utah"

Nearly 17,000 employees in Utah's state government (about 80 percent of the workforce) have moved to a mandatory 4/10 compressed workweek schedule (working full-time hours in 4 days per week). Such an endeavor was not easy, but Governor Jon Huntsman's commitment to lowering the state's energy costs, reducing the carbon footprint, increasing energy efficiency, improving customer service and providing workers with more flexibility were key drivers in implementing this major initiative. The program was announced to the media on June 20, 2008 with an implementation date of August 4 in the same year.

The **Utah State Department of Human Resources** conducted a methodical review of what they needed to do to implement the Governor's initiative. A survey of the workforce was conducted to determine what the biggest obstacles were to full implementation of the mandatory 4/10 schedule (80 percent were in favor of moving to the 4/10 schedule and 20 percent had concerns). Top concerns included child care and public transportation.

To address these issues, the state utilized its relationship with child care providers and the Utah Transit Authority to encourage a modification in schedules and hours of operation to better align these services with the compressed workweek schedule. In follow-up surveys with the workforce in terms of how satisfied they are with the 4/10 schedule (and they are highly satisfied) these two concerns have come close to being eliminated.

An outreach and information campaign was also quickly executed to educate the public about the effects of the 4/10 initiative for key services (such as the department of motor vehicles). The "Extended Hours/Extended Service" outreach effort was aimed at helping customers understand that service hours would be extended Monday-Thursday from 7:00 a.m. - 6:00 p.m. and that more than 800 services are available and accessible online.

Utah has published an Interim Report with very positive early indicators (see following chart from Working 4 Utah Interim Report).

INTENDED BENEFITS & SUMMARY OF EARLY INDICATORS	
<p>Energy: state savings on building operational costs, as well as spreading the load on transportation infrastructure.</p>	<p>\$203,177 reduction in custodial service contracts this year</p> <p>Early energy usage data indicates that one-half of the buildings in the study are achieving 10% to 20%+ energy usage reductions</p>
<p>Extended Service: maintaining productivity while improving availability of State services beyond the traditional workday.</p>	<p>Agency customer service survey results are similar to periods prior to the initiative</p> <p>Utilization of Utah.gov web services continues to increase</p>
<p>Employees: quality of life benefit to existing State employees, as well as an increased ability to recruit new talent.</p>	<p>Employee attitudes are more positive toward the 4/10 schedule</p> <p>Employees are at work more and using leave time less frequently; absenteeism is down</p>
<p>Environment: reduced energy usage correlates to reduced CO2 emissions.</p>	<p>Estimated reduction of 12,652 metric tons of greenhouse emissions produced annually</p> <p>Estimated reduction of 744,000 gallons of gasoline consumed annually</p>

(Flex-Options Resource: "Compressed Workweeks: Successful Implementations and Bottom Line Results," October 16, 2008, National Teleconference. Interim Report available at www.utah.gov/governor/docs/working4utahinterimreport.pdf)

Flexibility Is a Way to Accomplish Work, Not a Program

In successful companies that utilize flexibility, it is the way they do business. That is, these firms understand that flexibility is a way to enhance employee ownership and participation without sacrificing results and productivity. In fact, efficiency and the bottom line are improved. For example, **Phase Forward LLC**, a firm that helps companies build, launch and market products, is built around this core concept. This San Francisco firm attracts highly-skilled workers who place a premium on flexibility – its project-oriented business model supports this demand for flexibility. The flex-enabling environment provided by Phase Forward is key to creating a culture of flexibility, one that is modeled at the highest level of the business.

"My first goal was to build a business that delivered strong results in a less bureaucratic environment than the typical corporate structure," said Noel Adams, founder of Phase Forward. She wanted to enjoy her work more by changing some of the physical characteristics that kept her feeling tied to a desk in a building. In talking with colleagues who were mothers, she learned that they wanted more time with their kids, along with challenging, professional work opportunities and a good income. With a core team of five, all of whom work from home, the company is able to take on projects that interest them and fit their preferences, whether that involves working with a laptop at the beach, analyzing market research on weekends or late at night when kids are sleeping, or working a regular schedule.

The outcome? With good communication and a highly motivated and committed team, the company is generating profitable employment that meets their financial, professional and personal goals. Clients are benefiting too with professional services and project deliverables completed on schedule and at competitive rates.

(Flex-Options Resources: "What's New in Flexibility," March 10, 2005 and "Flex-Options Lessons Learned: Sharing Best Practices," Sept. 15, 2005, National Teleconferences.)

Communication Is Critical

Communication is central to the success of workplace flexibility. Clear ground rules about how to implement flexibility and evaluate work performance are necessary to ensure the arrangement is working and meeting business needs. There must be measurable input/output and standards to make the arrangement work. Once a flexible arrangement is approved, reviewing the agreement regularly (30-60-90 days, for example) will help ensure it is working and meeting business needs. In fact, all flexible arrangements should be reviewed to ensure they remain a win-win for everybody.

It is also important to establish effective communications between employees and managers. **Collective Solutions & Services** in Denver is a document image solutions company offering equipment sales, services, supplies, and outsourced print and scan. Working with Flex-Options mentors, the firm enhanced their virtual work program. To improve communications, they implemented text messaging for their home-based Customer Service representatives to better collaborate and more quickly resolve problems. The company believes the enhancements have increased revenue by maximizing employee effectiveness.

(Flex-Options Resources: "Barriers to Flexibility," February 11, 2004, and "Job-Sharing: Combining Skills, Perspectives and Time on the Job," April 15, 2004, National Teleconferences; Flex-Options, Region V Conference, February 12, 2004, Hewitt Associates, "Top Ten Tips for Implementing Flexibility.")

Focus on Results

In moving toward a more flexible work environment, an easier-said-than-done task for many employers is adhering to the concept of placing emphasis on results rather than face-time. This is particularly difficult in some business sectors where hours clocked at the desk have been, and continue to be, highly rewarded. In a flexible environment, however, work is defined differently. Focusing less on the where, when, and how work gets done and more on actual results — that is, what the employee produces — is central to creating and maximizing workplace flexibility.

Regan Dahle, a partner with law firm **Butzel Long**, has proven that such barriers are not insurmountable when it comes to reaching the most sought after title in her profession — law firm partner. Regan has two young children, and while she works at both the firm's Detroit and Ann Arbor offices, she also has the option of working from home. She made partner in this prestigious law firm with such flexibility. Barriers in certain industry sectors are slowly eroding as CEOs see a great need to retain, or "re-attach" with talented and highly skilled women who are considering taking time away from their jobs or careers because of family obligations. Innovative companies focus on ways to keep these women, as well as men, engaged in their firms — they are results-oriented and design ways to work that reflect the new reality.

(Flex-Options Resource: "Career Flexibility," May 18, 2006, National Teleconference; Flex-Options, Region V Conference, February 12, 2004, Hewitt Associates, "Top Ten Tips for Implementing Flexibility.")

The Team Can Help Design Flexibility

Asking the team, or group of employees, to develop strategies for completing work more flexibly can result in creative approaches. At **Heating and Plumbing Engineers, Inc.**, employees presented CEO and chairman Kelly Eustace with a “summer hours” plan that was adopted by the Colorado-based company. Because the group’s workload during the months of May to September was not as demanding, employees worked an extra 30 minutes Monday through Thursday in order to leave work at 12:30 p.m. on Fridays.

Hydee Willis, owner and president, **Creative Expressions**, brought various and diverse groups together from within her marketing and advertising company to develop ideas for flexibility. Acting on those ideas and keeping her employees involved in developing ways to run the business has resulted in very low turnover at her Utah-based company. One of the most proven methods of affirmatively responding to a request for flexibility is asking the employee, or employees, to propose a win-win solution and a strategy for its execution.

(Flex-Options Resources: “Trends in Flexibility,” January 8, 2003, and “Flex-Options Lessons Learned: Sharing Best Practices,” Sept. 15, 2005, National Teleconferences.)

Support for Flexibility Begins at the Top

In a business or an organization where flexibility is the norm, it is fully integrated in business operations and processes. There is no stigma attached to flexibility and it finds support at the highest leadership levels. Managers and business owners not only support flexibility, they model it. **BrownFlynn Communications**, a successful Ohio firm built from a job share between the two female owners, established family-friendly policies and flexibility as core principles for growing their firm. As principal and co-owner Margie Flynn says, they “walk the walk.” Yet flexibility is a two-way street at BrownFlynn – it is not an entitlement. Successful arrangements at BrownFlynn require mutual respect, a healthy give-and-take and mature communication.

Carol Ann Schneider, CEO, **Seek Inc.**, a Wisconsin-based human resource and staffing firm, personally meets with all new employees to explain the company’s culture, history and commitment to employees. Flexibility, particularly the informal kind, is fused into Seek’s culture. It’s one way they give back to hard-working employees. Building and sustaining a culture of flexibility gives businesses an extraordinary advantage over others in that employees are more loyal, more productive and less apt to leave.

(Flex-Options Resources: “Flex Best: Women Business Owners Share Best Practices,” Aug. 6, 2004, and “Flexibility Challenges: Overcoming the Barriers, Defying the Myths,” Feb. 11, 2004, National Teleconferences.)

Thinking About Implementing Flexibility? Start Small.

It is often best to begin flexibility on a small scale or through a pilot program. If successful, the program can be expanded if the employer or manager and the employees are comfortable with the arrangement. For example, in a telecommuting arrangement, begin with one or two telecommuters working from home one or two days a week and gradually build from that point, if appropriate. Start with a low-risk trial program. At **Mini University**, a company that operates corporate-sponsored child development centers in Ohio, managers and employees worked together to develop a common understanding of the various types of flex arrangements that might work for their business. Then, Julie Thorne, the firm’s president, surveyed managers about their flexibility needs and piloted a program with this group. The pilot helped identify and address challenges. In starting small, or with a pilot, a flexible arrangement can be more easily assessed for its effectiveness and modifications can be made on a more manageable scale.

(Flex-Options Resources: “Telecommuting: Trends, Myths & Realities,” March 11, 2004, and “Flex-Options Lessons Learned: Sharing Best Practices,” Sept. 15, 2005, National Teleconferences.)

A Culture of Flexibility Shapes Success

How do you know if a firm or organization is committed to workplace flexibility? A written policy may be one indicator, but a key determinant is the culture — that is, flexibility is embraced at the highest levels with processes and policies in place to accommodate and encourage flexibility. At **Pfizer Global Research and Development** in Michigan, not only are such policies and processes present, but the business case for flexibility has been “embraced by the highest level of our organization” and managers “speak the language of flexibility, accommodation and inclusion,” according to Elaine Shaw, Associate Director of Human Resources. Guidance and support for seeking a flexible work arrangement are provided by, for example, Pfizer’s “Flex Places” program that encourages employees to create proposals enabling them to work from home on a regular basis.

At **Ennis, Pellum and Associates, CPAs** — a small firm in Jacksonville, Florida — flexibility is supported by technology, which enables unbroken communication, personal accountability and an efficient work environment. According to Anna

Broche, Shareholder and Director of Attestation Services for the firm, “The culture and leadership has to really wrap itself around the concept and not just talk flexibility, but also walk flexibility.” In that regard, Anna utilizes and appreciates the many benefits of flexibility.

All employees are plugged into each other’s online calendars so they can be a resource for the team when needed. A networking system allows access to software and projects off-site, which employees can access following a 90-day probationary period. A culture of flexibility can be demonstrated in multiple ways – processes, policies and other tools. More significantly, authentic support at the highest levels creates a fertile environment for flexibility. This means employees feel comfortable discussing and using flexibility without repercussion, and a consistent approach and attitude toward flexibility is represented throughout the organization.

(Flex-Options Resource: “Flex Check: A Progress Report from Business – Insight from Business Leaders on Workplace Flexibility Programs,” Nov. 16, 2006; and “Overcoming the Barriers to Creating a Flexible Workplace,” February 11, 2004, National Teleconferences.)

Evaluating Employee Proposals for Flexibility

Flexible options should not be implemented merely for flexibility’s sake. It is important to determine creative ways to get the job done that support business priorities while meeting the needs of employees. Organizations that provide employees with guidance or support in proposing flexible work arrangements may have better outcomes in creating win-win results. Such support and engagement also helps to ensure that all parties are “singing from the same song sheet” with respect to understanding what is being requested and how proposals parallel business goals and priorities, or potential restrictions in granting the full request. For example, the request process at **Pfizer Research and Development** in Michigan includes a form that takes the employee through a series of questions to help describe the proposed work arrangement, and how it will sustain or enhance the employee’s ability (and the team’s) in accomplishing business objectives. Pfizer also provides management with positive guidance in terms of assessing such proposals.

At other companies, the employee task force can be an effective model that leads to an organic solution in assessing flexibility. Such initiatives have helped to re-design jobs, or how work is done, leading to improvement in actual results. Since more people are requesting flexibility as a pre-condition for employment, business owners and managers can also think more proactively about positions they post – could the job be done on a flexible basis? Would a compressed workweek, telecommuting, part-time or job share arrangement work for this position? Thinking proactively,

tapping into the team and providing employees with guidance and support when they propose working flexibility can lead to better outcomes for the organization.

(Flex-Options Resource: "Flex Check: A Progress Report from Business – Insight from Business Leaders on Workplace Flexibility Programs," Nov. 16, 2006; and "Overcoming the Barriers to Creating a Flexible Workplace," February 11, 2004, National Teleconferences.)

Communicating a Flexible Work Options Policy

National-Louis University (NLU) developed a Flexible Work Options policy with support from the president of the university, as well as with input from various staff and administrative representatives. The memo below, written by NLU's Vice President of Human Resources Thomas R. Bergman, is an example of how to communicate a new workplace flexibility policy.

"To All Non-Faculty Staff,

At the suggestion of the Staff Council, and with the support and recommendation of the President, a task force was convened and charged with exploring "flexible work options" for staff members. We are pleased to announce that National-Louis University now offers "Flexible Work Options" to full and part time staff.

Several months ago, Dr. Pappas charged a Flexible Work Options Task Force with drafting a policy suitable to the unique needs of NLU. The Task Force, made up of 9 staff and administrative representatives from throughout the University, considered several types of flexible work arrangements, as well as their benefits and implications for University operations. Additionally, careful consideration was given to developing a Flexible Work Options policy that could be implemented in a fair and equitable manner, could be adapted to the needs of departments throughout the University, and would allow for the ongoing enhancement of our service excellence initiatives.

Some of the highlights of the new Flexible Work Options Policy include:

- Flextime, Telecommuting, Job Sharing and Home Office definitions, including eligibility requirements for each
- Specific items that need to be considered by both the employee and the supervisor related to meeting the ongoing needs to the University and specific department(s)
- A step-by-step flex time application and approval procedure

- An easy to follow Flexible Work Options Application Form with space for detailed explanations of proposals, as well as space for comments or suggestions from both the immediate supervisor and the department Vice President or Dean

The application procedure will require employees to apply for a particular option as well as address any potential issues that could arise from a change to their schedule. Once an employee has completed the required application form, their flexible work arrangement will require the approval of both their immediate supervisor and department Vice President or Dean. Upon approval by both the immediate supervisor and department Vice President or Dean, the application will then need to be sent to the Office of Human Resources for an agreement to be issued, which the employee will be required to sign and return within 5 business days, at which point their flexible work arrangement will become effective.

The full policy can be found attached to this email, as well as on the Policies and Procedures page of NLU's community website at <http://community.nl.edu>, under the heading of Recruitment and Employment policies.

A similar email was sent to all managers and supervisors yesterday. We encourage you to talk with your supervisor if you are interested in exploring potential options for yourself or to contact the Office of Human Resources at ext. 5275 with any questions or concerns."

(Flex-Options Region V, Model Practice Employer, April 2009)

TOOLS TO GET STARTED

The remaining pages of this Flex-Options Guide provide basic tools to help managers and employees create more flexible workplaces. For more information on workplace flexibility, the Flex-Options program or events, or to link up with a flexibility mentor, please visit www.flexoptions.org or contact the Women's Bureau directly at 202-693-6710 or www.dol.gov/wb/contacts/main.htm.

Manager Tips: Fundamentals of Creating a Flexible Workplace

- 1. Create a business proposal approach.** Design a process where employees submit a proposal describing how their work will be accomplished, how they will maintain or improve productivity, and the impact their request will have on various aspects of the business. (For requests for occasional flexibility, a formal business plan may not be necessary.)
- 2. Establish a review process.** Review all requests for flexibility submitted by employees. Some requests will not be implemented due to the nature of a job, staffing needs, customer/client constraints, or employee performance. If the proposed arrangement is unworkable for business reasons, brainstorm and consider other options.
- 3. Consider an employee's performance.** Employees who have not demonstrated strong self-management skills and high levels of dependability are typically not the best candidates to work a flexible arrangement. However, keep in mind that there will be some situations when flexibility is exactly what an employee might need to resolve a personal issue that has affected their job performance.
- 4. Involve the team.** Prior to approving an arrangement, ask the employee to share his or her proposal with team members, discuss any issues and brainstorm solutions.
- 5. Clearly outline expectations.** Discuss performance expectations, including work accomplished, communication, attendance at meetings, etc., with the employee prior to commencing the arrangement. Ensure that the focus will be on the employee's work performance, consistency of contribution, and results – not face time.
- 6. Conduct frequent reviews.** Treat the new arrangement as a pilot for 3 to 6 months. Establish measurements and review the success of the arrangement at regular intervals.

Employee Tips: Considering a Flexible Work Arrangement

The following is a brief overview of employee tips and considerations that may be helpful to incorporate into your workplace flexibility guidelines and request process. Some employers create self-assessment and business proposal forms to guide employees through questions to consider as they develop their proposals for workplace flexibility. These tools help ensure that the request meets the needs of the employee and the demands of business.

Employee Self-Assessment

The first step to requesting a flexible work arrangement is to consider your work style and think about why you want to work flexibly. You have the best chance for success if you have a history of good performance at work and strong self-management skills such as:

- Taking initiative
- Using sound judgment when making decisions
- Meeting deadlines
- Managing multiple priorities effectively
- Listening well
- Communicating clearly
- Organizing your work effectively

Depending on your personal situation, you may also need to consider any impact that workplace flexibility will have on your dependent care responsibilities and expenses, household finances and benefits coverage.

Employee Proposal

Once you have completed a personal assessment, it is time to develop a business proposal to present to your manager demonstrating how you will sustain – or enhance – your job performance. Formal business proposals may not be required for every type of flexible option – or for occasional or ad hoc schedule or workplace changes. Check with your manager first.

On the following page are some questions to consider; answers might be incorporated into your proposal.

Employee Tips: Proposing a Flexible Work Arrangement

Proposal Considerations

- What type(s) of flexible work arrangement(s) are you interested in? How long do you plan to work the arrangement(s)? What hours and days are you proposing to work and from what location(s)?
- Are there specific hours and days that you must be present at work in order to accomplish your job responsibilities? Does your proposed flexible option accommodate these?
- Can you complete all of your current job responsibilities while working a flexible schedule? What adjustments, if any, will you need to make to accomplish your work?
- How will you continue to meet deadlines and be available for critical situations that may arise on the job?
- What are the anticipated benefits and challenges of this new arrangement with regard to your ability to get the job done and the impact on your internal and external customers, employees (if you are a supervisor/manager), co-workers, manager, and the company?
- Will working a flexible arrangement allow you to accomplish your short- and long-term career goals? If yes, how? If no, have you considered adjusting your goals?
- How – and when – will you and your manager assess the effectiveness of your arrangement?
- If you supervise a team of employees, how will you ensure you are available to meet their needs? How will you manage differently if you are on a flexible schedule?
- How will your communications with your team, co-workers, managers, and customers differ once you are on a flexible schedule?

Suggestions for Implementation

- Once you present your business plan, be ready to work with your manager to fine-tune the plan, suggest other options, and prepare for implementation.
- Ensure that you discuss and fully understand your manager's expectations related to your performance and communication.
- Determine how the arrangement will be measured. How will you know it has been successful? Ask for – and listen to – feedback from your colleagues, manager, and customers/clients.

Manager Tips: Reviewing and Implementing a Proposal

Reviewing the Proposal

- Be open to discuss requests for additional flexibility and consider all alternatives, not just the one the employee initially proposes. If the initial proposal does not meet business needs, discuss what modifications might result in an acceptable solution.
- Ensure the employee's proposal addresses how all responsibilities will be met or exceeded and includes contingency plans. Discuss any impact on the team and customers/clients. Define techniques to ensure ongoing communication and to measure success.
- Involve team members. Ask them to review the proposal with the employee before it is presented to you. Co-workers can then express any concerns and offer solutions.
- If employee requests overlap or otherwise conflict, encourage the individuals to work together to develop alternative solutions.
- Talk with the employee about how a particular flexible work arrangement fits into their short- and long-term career goals.
- Work-life conflict may be a contributing factor to poor performance. However, be sure to address the performance issues up front before considering a flexible arrangement.

Defining Job Expectations

- Identify work requirements that cannot be changed, such as coverage during certain hours.
- Identify workgroup requirements, such as defining core business hours when all employees are at work.
- Establish measurable goals and objectives.
- Be specific with the employee regarding how you will handle certain business requirements to avoid misunderstandings, such as:
 - Regular team meetings where attendance is mandatory. Is participation by conference call an option?
 - Informal communication with employee – when will email suffice?
 - Business travel requirements.
 - Face-to-face customer/client interaction.
 - Regular phone coverage, if necessary.
 - Extended hours during peak business cycles (e.g., budget time).
 - Availability to customers/clients and co-workers.

Modifying the Proposal

If you are undecided after reviewing an employee's proposal, below are some options.

- Identify specific concerns and discuss them candidly with the employee
- Involve the employee (and the team, as appropriate) to identify solutions
- Consider different hours or days, or combine approaches/options
- Pilot the arrangement for 90 days or another definite time frame
- Implement the arrangement at a later date when business conditions change.

Implementing an Arrangement

- You may want to consider piloting any arrangement when first implemented.
- Ensure employees understand your expectations and realize the arrangement will be evaluated on an ongoing basis.
- Create any blackout periods, such as during budget times.
- Show support for flexibility by introducing the arrangement to the team, describing any changes to the work process, and encouraging ongoing open discussion and feedback.

Reviewing an Arrangement

- Evaluate the arrangement frequently, starting with 30, 60 and 90 day reviews.
- Review whether goals are being met in a timely manner. Is productivity being maintained?
- During the reviews, discuss any specific issues, including the ability to get the job done, communications, effect on co-workers and customers/clients, technology, etc.

Ending an Arrangement

- Flexible work arrangements are not tied to a position or employee forever. If business and/or personal needs change, the arrangement may be modified or ended by the employee or manager. Communicate the process. In certain situations, an employee may have to wait until vacancies occur to return to a previous work schedule or work location.

Moving to a New Job or a New Manager

- When an employee applies for a job outside of your organization, encourage him/her to discuss workplace flexibility with the hiring manager. A flexible arrangement that works well in one position may not easily transfer to another job. This may be due to the nature of the job itself, or the need for the

- employee to work a different schedule or return to the office location until he/she has become proficient in the new position.
- If you move to a new position managing employees working established flexible options, meet with each to review his/her arrangement and discuss expectations and communication plan. If the arrangement has been successful in the past, there is usually no reason why it cannot be continued with you as the new manager.

The next section includes templates to assist HR professionals and managers in creating policies or guidelines for different types of Flexible Work Arrangements.

FLEXTIME GUIDELINES TEMPLATE

This template highlights basic information that might be included in a flextime policy.

Purpose

What is the purpose of issuing flextime guidelines (e.g., to outline eligibility, scheduling options, etc.)? This is where you might mention how it links with business and/or work-life objectives.

Scope

This includes a short summary of the scope of flextime; details should be provided in the appropriate section(s) that follow. What is the definition of flextime at your company? Does it involve adjusting start and end times of work only? Or does it also include establishing core hours? Are there guidelines or requirements as to how early employees can start work, or how late they can stay? Is the schedule ongoing or temporary? Can it be implemented with teams or entire divisions? Is it a stand-alone option, or can it be implemented in conjunction with other flexible work arrangements? Will it impact benefits or compensation? How will flextime impact (if at all) policies regarding timecards, breaks and overtime?

Eligibility

Who is eligible to work a flextime schedule? Are regular and part-time employees eligible? Exempt and non-exempt? Is flextime available to union-represented employees at all locations? This is a good place to make a statement about flextime not being a benefit or entitlement and that requests must make good business sense.

Requesting a Flextime Schedule

What steps do employees need to follow to request a flextime schedule? Are they required to review employee considerations or complete a self-assessment? If so, where are these tools located? Are they required to develop and submit a business plan? Is there a business plan template available for them to follow? If so, where is it located? Do they need to involve their team in the development of the business plan? Here is a good place to make a statement about how flextime proposals will be considered – in light of operational, workload and performance factors.

Scheduling

Describe examples of flextime schedules that might be available, such as daily variable hours, core hours, day-of-the-week flextime, summer hours, etc.

Impact on Compensation and Benefits

What impact, if any, does a flextime schedule have on compensation and benefits?

Scheduled Time Off

Will you require employees, on occasion, to adjust their schedules to participate in business activities?

Terminating a Flextime Schedule

How do employees request a return to a "traditional" schedule? When can they request this? Will they be able to return to a "traditional" schedule immediately? What process will be followed if a manager decides that business needs or employee performance no longer support a flextime schedule for the particular employee? If the employee is requested to return to a "traditional" schedule, how much notice will be given?

Review Process

Will your company review the overall flextime guidelines on a regular basis and revise as necessary (e.g., annual review)? Will the employee's manager review the success of the flextime arrangement with the individual employee and/or team on a regular basis? What factors will be considered in this review?

COMPRESSED WORKWEEK GUIDELINES TEMPLATE

This template highlights basic information that might be included in a compressed workweek policy.

Purpose

What is the purpose of issuing compressed workweek guidelines (e.g., to outline eligibility, scheduling options, impact on holidays and vacation, etc.)? This is where you might mention how it links with business and/or work-life objectives.

Scope

This includes a short summary of the scope of compressed workweeks; details should be provided in the appropriate section(s) that follow. What is the definition of compressed workweeks at your company? What options does it include (e.g., 4/10, 3/12, 9/80, etc.)? Is the arrangement ongoing or temporary? Can it be implemented with teams or entire divisions? Is it a stand-alone option, or can it be implemented in conjunction with other flexible work arrangements? Will it impact compensation or benefits? How will compressed workweeks impact (if at all) policies regarding timecards, breaks and overtime?

Eligibility

Who is eligible to work a compressed workweek schedule? Are regular and part-time employees eligible? Exempt and non-exempt? Are compressed workweeks available to union-represented employees at all locations? This is a good place to make a statement about compressed workweeks not being a benefit or entitlement and that requests must make good business sense.

Requesting a Compressed Workweek Schedule

What steps do employees need to follow to request a compressed workweek schedule? Are they required to review employee considerations or complete a self-assessment? If so, where are these tools located? Are they required to develop and submit a business plan? Is there a business plan template available for them to follow? If so, where is it located? Do they need to involve their team in the development of the business plan? Here is a good place to make a statement about how compressed workweek proposals will be considered – in light of operational, workload and performance factors.

Scheduling

Define each of the compressed workweek schedules that might be available, such as 4/10, 3/12, 9/80, etc. For example, a 4/10 compressed schedule is working four days each workweek, or four 10-hour days. This schedule might be created to work Monday through Thursday with every Friday off. In this situation, are other options available, such as taking a different day off, rotating days off within the workgroup, or alternating schedules where one group has Fridays off and another has Mondays off? Be sure to review and include important information on federal and state laws (they differ by state) about scheduling compressed workweeks.

Impact on Compensation and Benefits

What impact, if any, do compressed workweeks have on compensation and benefits?

Holidays

Describe how holidays will be compensated. If a holiday falls on an employee's normally scheduled day off, how will the employee be compensated (e.g., can the employee request a different day off within the same pay period as the holiday)? If a holiday falls on an employee's normally scheduled workday, how many hours of holiday pay will the employee receive? For example, if an employee is scheduled to work a 10-hour day on a holiday, will they receive 8 hours of holiday pay and 2 hours of regular pay?

Vacation

How will vacation be paid? An employee's annual vacation allotment should not change with a compressed workweek schedule when the employee continues to work full-time. How will your pay system handle day-at-a-time vacations? For example, if an employee working a 9/80 schedule takes one vacation day on a 9-hour workday, 9 hours of vacation pay should be deducted from the employee's vacation allotment.

Scheduled Time Off

Will you require employees, on occasion, to adjust their schedules to participate in business activities? How will exempt and non-exempt employees be compensated for working on a scheduled day off?

Terminating a Compressed Workweek Schedule

How do employees request a return to a "traditional" schedule? When can they request this? Will they be able to return to a "traditional" schedule immediately? What process will be followed if a manager decides that business needs or employee performance no longer support a compressed workweek schedule for the particular employee? If the employee is requested to return to a "traditional" schedule, how much notice will be given?

Review Process

Will your company review the overall compressed workweek guidelines on a regular basis and revise as necessary (e.g., annual review)? Will the employee's manager review the success of the arrangement with the individual employee and/or team on a regular basis? What factors will be considered in this review?

PART-TIME GUIDELINES TEMPLATE

This template highlights basic information that might be included in a part-time policy.

Purpose

What is the purpose of issuing part-time guidelines (e.g., outline eligibility, impact on compensation and benefits, etc.)? This is where you might mention how it links with business and/or work-life objectives.

Scope

This includes a short summary of the scope of part-time; details should be provided in the appropriate section(s) that follow. What is the definition of part-time at your company? Provide examples of typical options (e.g., 32-hour workweeks, 20-hour workweeks). Can the arrangement be temporary for a specific time frame? Can it be used as a phase-back option from maternity or other leaves of absence, or as a phased retirement option? Is it a stand-alone option, or can it be implemented in conjunction with other flexible work arrangements? Will working part-time impact benefits and compensation? Will part-time impact policies regarding timecards, breaks and overtime?

Eligibility

Who is eligible to work a part-time schedule? Exempt and non-exempt? Is part-time available to union-represented employees at all locations? This is a good place to make a statement about part-time not being a benefit or entitlement and that requests must make good business sense.

Requesting a Part-Time Schedule

What steps do employees need to follow to request a part-time schedule? Are they required to review employee considerations or complete a self-assessment? If so, where are these tools located? Are they required to develop and submit a business plan? Is there a business plan template available for them to follow? If so, where is it located? Do they need to involve their team in the development of the business plan? Here is a good place to make a statement about how part-time proposals will be considered – in light of operational, workload and performance factors.

Scheduling

Describe part-time schedule options that are available. For example:

- 50% part-time: 20 hours per workweek
- 60% part-time: 24 hours per workweek
- 75% part-time: 30 hours per workweek
- 80% part-time: 32 hours per workweek

Impact on Compensation and Benefits

How does working part-time impact compensation and benefits? Describe separately for non-exempt and exempt employees. For example, a non-exempt employee should receive the same hourly pay rate when working part-time as a full-time employee at the same level. Non-exempt employees should be paid for the actual hours worked.

Exempt employees should receive the same hourly pay rate for working part-time as full-time positions at the same level. However, exempt employees receive a prorated amount of their full-time salary. Provide an example. When exempt employees work beyond their scheduled part-time hours, do they receive additional pay or comp time?

PTO

If time off is allocated to a paid time off bank (PTO), how will it be prorated for part-time employees? Provide an example. For companies that do not have PTO programs, days off are typically prorated by category (e.g., vacation, holidays, paid sick time) for part-time employees.

Vacation

Describe how vacation is prorated for part-time employees. For example, to calculate part-time vacation hours, multiply the full-time equivalent hours you are eligible for by the percent of time you are working: 80 (hours of vacation, full-time equivalent) \times 0.60 (percent of a full-time schedule, 24 hours per workweek) = 48 hours of vacation time per year.

Holidays

Describe how company-paid holidays are prorated for part-time employees. For example, if an employee works 50 percent of a full-time schedule, he or she will be paid 4 hours for each holiday; an 80 percent part-time employee would be paid 6.4 hours per holiday. If a holiday falls on a day that the employee is scheduled to work

more than the prorated number of holiday hours, is the employee responsible for working additional hours later in the workweek to make up the time? Is this an option or a requirement?

Paid Sick Time

How is paid sick time prorated for part-time employees?

Incentive Pay

Are part-time employees eligible for any company incentive pay? How is their payout prorated for each type available?

Retirement and Pension Benefits

How do part-time employees accrue retirement and pension benefits? Either describe or refer them to Plan documents.

Scheduled Time Off

Will you require part-time employees, on occasion, to adjust their schedules to participate in business activities? How will you compensate exempt and non-exempt employees who are required to work beyond their part-time scheduled hours?

Terminating a Part-Time Schedule

How do employees request a return to a full-time schedule? When can they request this? Will they be able to return to a full-time schedule immediately? How does this process work if the employee wants to remain part-time, but increase or decrease the number of hours worked per week? What process will be followed if a manager decides that business needs or employee performance no longer support a part-time schedule for the particular employee? If the employee is requested to return to a full-time schedule, how much notice will be given?

Review Process

Will your company review the overall part-time guidelines on a regular basis and revise as necessary (e.g., annual review)? Will the employee's manager review the success of the arrangement with the individual employee and/or team on a regular basis? What factors will be considered in this review?

JOB SHARING GUIDELINES TEMPLATE

This template highlights basic information that might be included in a job sharing policy.

Purpose

What is the purpose of issuing job sharing guidelines (e.g., outline eligibility, impact on compensation and benefits, etc.)? This is where you might mention how it links with business and/or work-life objectives.

Scope

This includes a short summary of the scope of job sharing; details should be provided in the appropriate section(s) that follow. What is the definition of job sharing at your company? Is it just two employees sharing a full-time job, each working 50 percent? Or are other options available? Can the arrangement be temporary for a specific time frame? Can it be used as a phase-back option from maternity or other leaves of absence, or as a phased retirement option? Is it a stand-alone option, or can it be implemented in conjunction with other flexible work arrangements? Will job sharing impact benefits and compensation? Will job sharing impact policies regarding timecards, breaks and overtime?

Eligibility

Who is eligible to work a job sharing schedule? Exempt and non-exempt? Is job sharing available to union-represented employees at all locations? This is a good place to make a statement about job sharing not being a benefit or entitlement and that requests must make good business sense.

Requesting a Job Sharing Schedule

What steps do employees need to follow to request a job sharing schedule? Is an employee responsible for finding a job share partner and requesting the arrangement as a team? Are they required to review employee considerations or complete a self-assessment? If so, where are these tools located? Are they required to develop and submit a business plan? Is there a business plan template available for them to follow? If so, where is it located? Do they need to involve their team in the development of the business plan? This is a good place to make a statement about how job sharing proposals will be considered – in light of operational, workload and performance factors.

Scheduling

What scheduling options are available to employees who job share? Options may include: working back-to-back hours splitting each daily shift, working different days of the week, overlapping shifts or days, working one week on and one week off, etc.

Impact on Compensation and Benefits

How does job sharing impact compensation and benefits? Describe separately for non-exempt and exempt employees. For example, a non-exempt employee should receive the same hourly pay rate when job sharing as a full-time employee at the same level. Non-exempt employees should be paid for the actual hours worked.

For exempt employees there should be no difference between hourly pay rates for job share and full-time positions at the same level. Exempt employees receive a prorated amount of their full-time salary. Provide an example. When exempt employees work beyond their scheduled job share hours, do they receive additional pay or comp time?

PTO

If time off is allocated to a paid time off bank (PTO), how will it be prorated for job sharing employees? Provide an example. For companies that do not have PTO programs, days off are typically prorated by category (e.g., vacation, holidays, paid sick time) for job sharing employees.

Vacation

Describe how vacation is prorated for job sharing employees.

Holidays

Describe how company-paid holidays are prorated for job sharing employees. For example, if an employee works 50% of a full-time schedule, he or she will be paid 4 hours for each holiday. If a holiday falls on a day that the employee was scheduled to work more than the prorated number of holiday hours, is the employee responsible for working additional hours later in the workweek to make up the time? Is this an option or a requirement?

Paid Sick Time

How is paid sick time prorated for job sharing employees?

Incentive Pay

Are job sharing employees eligible for any company incentive pay? How is their payout prorated for each type available?

Retirement and Pension Benefits

How do job sharing employees accrue retirement and pension benefits? Either describe or refer them to Plan documents.

Scheduled Time Off

Will you require job sharing employees, on occasion, to adjust their schedule to participate in business activities? How will you compensate exempt and non-exempt employees who are required to work beyond their scheduled hours?

Terminating a Job Sharing Schedule

How do employees request a return to a full-time schedule? When can they request this? Will they be able to return to a full-time schedule immediately? How does this process work if the employee wants to continue job sharing, but increase or decrease the number of hours worked per week? What process will be followed if a manager decides that business needs or employee performance no longer support a job share schedule for the particular employee? If the employee is requested to return to a full-time schedule, how much notice will be given?

Review Process

Will your company review the overall job sharing guidelines on a regular basis and revise as necessary (e.g., annual review)? Will the employee's manager review the success of the arrangement with the individual employee and/or team on a regular basis? What factors will be considered in this review?

TELECOMMUTING GUIDELINES TEMPLATE

This template highlights basic information that might be included in a telecommuting policy. Organizations may elect to prepare a separate legal telecommuting agreement with details on the arrangement, which is signed by the employee and a company representative.

Purpose

What is the purpose of issuing telecommuting guidelines (e.g., outline eligibility, options, equipment responsibilities, etc.)? This is where you might mention how it links with business and/or work-life objectives.

Scope

What is the definition of telecommuting at your company? From what locations can an employee work? How many days per week or month should they work virtually to be considered a telecommuter? Is telecommuting ongoing or temporary? Can it be implemented with teams or entire divisions? Is it a stand-alone option or can it be implemented in conjunction with other flexible work arrangements? How does telecommuting impact policies regarding timecards, breaks and overtime?

Eligibility

Who is eligible to work a telecommuting schedule? Are regular and part-time employees eligible? Exempt and non-exempt? Is telecommuting available to union-represented employees at all locations? Is there a length of service requirement employees must fulfill prior to requesting a telecommuting arrangement? Here is a good place to make a statement about telecommuting not being a benefit or entitlement and that requests must make good business sense.

Requesting a Telecommuting Schedule

What steps do employees need to follow to request a telecommuting schedule? Are they required to review employee considerations or complete a self-assessment? If so, where are these tools located? Are they required to develop and submit a business plan? Is there a business plan template available for them to follow? If so, where is it located? Do they need to involve their team in the development of their plan? This is a good place to make a statement about how telecommuting proposals will be considered – in light of operational, workload and performance factors.

Scheduling

What hours are employees required to work when telecommuting? Employees who telecommute should track their work hours in the same manner as they would in a company location. Will you require telecommuting employees, on occasion, to work from a company location on their scheduled telecommuting days?

Telecommuting Options

Describe the different types of telecommuters that are recognized by your company, such as full-time, home-based, intermittent, hoteling, and occasional. Categories of telecommuters are often defined to address the question of who pays for specific equipment and related expenses.

Furniture, Equipment, Software, and Supplies

Will telecommuters receive furniture (e.g., desk, chair, desk lamp, filing cabinet, etc.), equipment (e.g., computer, multi-function machine, telephone, etc.), software, and office supplies for their virtual office? List the specific equipment and supplies available. How will you determine which telecommuters receive the full complement of equipment and supplies? Be specific. What process must employees follow to request and receive equipment and supplies? What assistance is provided to telecommuters to ensure they establish a safe and ergonomic office set-up? Mention any policies related to the security and maintenance of company equipment and software use.

Reimbursable Business Expenses

What business expenses are covered for the telecommuter? For example, will your company cover the installation and monthly service charges for phone lines? How many phone lines will be covered? What about other expenses such as supplies, utility bills, building and remodeling of an at-home office, or travel expenses to and from a company work location?

Impact on Compensation and Benefits

What impact, if any, does a telecommuting schedule have on compensation and benefits

Dependent Care

What guideline will you put in place for dependent care arrangements while telecommuters are working? For example, will you require telecommuters who

work from an at-home office to arrange care for any dependents in the home 100% of the time during their work hours?

Confidentiality

What measures will you put in place to ensure that your company and its customers' materials are safeguarded at the telecommuter's work location?

Workers' Compensation and Liability Insurance

What is your company's policy covering personal injuries that occur during a telecommuter's workday? Do you allow telecommuters to meet with customers or colleagues at their remote work location? What responsibility does the telecommuter have to report any on-the-job injuries at their remote work location? Does your company's general liability insurance cover a telecommuter's work location?

Tax and Insurance Issues

State the telecommuter's responsibilities with regard to income tax and homeowner's or renter's insurance as they relate to maintaining an at-home office. Typically, it is the sole responsibility of the telecommuter to determine any income tax implications and to evaluate and cover insurance needs related to an at-home office.

Terminating a Telecommuting Schedule

How do employees request a return to a company work location? When can they request this? Will they be able to return immediately? What process will be followed if a manager decides that business needs or employee performance no longer support a telecommuting schedule for the particular employee? If the employee is requested to return to a company work location, how much notice will be given?

Review Process

Will your company review the overall telecommuting guidelines on a regular basis and revise as necessary (e.g., annual review)? Will the employee's manager review the success of the arrangement with the individual employee and/or team on a regular basis? What factors will be considered in this review?

SUMMARY

Creating a workplace culture that encourages flexibility in how, where and when work is accomplished can improve an organization's operations and competitive position while making a meaningful difference in the lives of its employees. Indeed, as demand for flexibility increases, workplaces that offer or remain open to workplace flexibility can have a strategic advantage in attracting and retaining quality employees.

A confluence of dynamics will continue to drive the demand for workplace flexibility. An aging workforce, skilled labor shortages, younger worker requirements for flexibility, better and more widespread use of technology, as well as lifestyle issues and needs will all serve to accelerate flexibility. Experts also point to the growing awareness and need for emergency preparedness planning as an enabler of flexibility – meaning that the steps and requirements organizations establish for business continuity planning serve to establish or improve internal systems for working flexibly. Other factors such as the economy, traffic congestion, the environment, and cost-cutting by companies are contributing to an awareness and use of flexibility.

A recent Flex-Options national teleconference on flexibility research reported on a growing acceptance by employers as real data demonstrates that workplace flexibility has a very positive bottom-line impact. In the teleconference, Ellen Galinsky, President and Co-founder of Families and Work Institute, noted “real energy” among employers in pursuing and implementing flexible workplaces. “I think we’re at the beginning of a tipping point. It’s being driven by the change in values of younger workers and by the change in values and needs of the baby boomers who have already changed the landscape as they’ve moved through the lifecycle,” said Galinsky.

FOR MORE INFORMATION

After reviewing this guide, we encourage you to tap into additional resources and information provided by the Flex-Options project. The Flex-Options Web site has valuable tools and materials, and there is no charge for the regularly scheduled national teleconferences featuring flexibility experts and business owners and leaders who have successfully implemented flex programs in their workplaces. Following the teleconferences, complete transcripts are available in PDF format on the Web site.

For more information, please visit the Flex-Options site:

www.flexoptions.org

Or contact the Women's Bureau directly:

202-693-6710

www.dol.gov/wb/contacts/main.htm.