



WORKFLEX

EMPLOYEE

WHEN  
WORK  
WORKS

TOOLKIT





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## When Work Works

*When Work Works* is a joint project of FWI and SHRM. Working with community partners across the country, *When Work Works* highlights and honors effective practices for making work “work” for employers and employees through the Alfred P. Sloan Awards for Excellence in Workplace Effectiveness and Flexibility. [www.whenworkworks.org](http://www.whenworkworks.org)



## FWI

Families and Work Institute is a nonprofit research organization that studies the changing workplace, family and communities, and creates projects that put its research into action. [www.familiesandwork.org](http://www.familiesandwork.org)



## SHRM

The Society for Human Resource Management is the world's largest association devoted to human resource management. [www.shrm.org/workflex](http://www.shrm.org/workflex)



# Preface

There is little question that the way Americans work and live has changed in recent years. The boundaries between work and home have blurred thanks to the fast-paced, global 24/7 economy, the pressures of competition and technology. It is more challenging than ever to manage (and feel a sense of satisfaction in) both our work and home lives. Thankfully, the workplace is shifting, and new ways of working called workflex are becoming a critical part of the solution.

As you think about improving workflex in your career, there are many factors you'll need to consider, including your own work-life values and understanding your employer's perspective when it comes to business priorities.

## About This Toolkit

This toolkit is a reference guide you can use through the process. This booklet will help you evaluate your own desire for workflex and offer guidance on how to talk to your supervisor and/or human resource professional in order to make your arrangement successful.

Throughout this guide, you'll see references made to human resource professionals. In some smaller organizations, that may mean reaching out to someone in charge of human resource issues such as a vice president, office manager or other person.

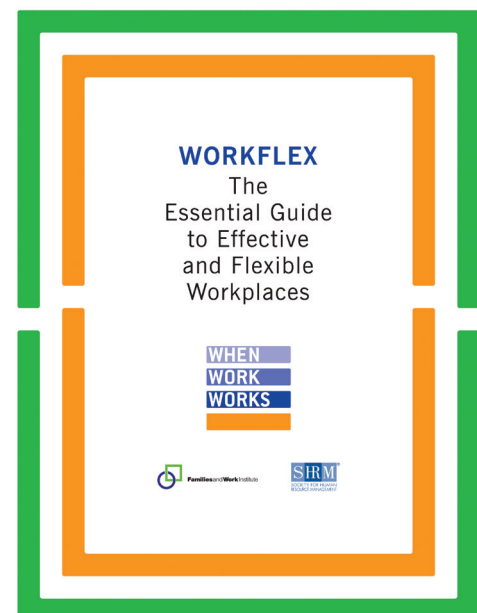
Managing your career path is an individual experience. What works for you may not be a good fit for someone else. And what seems most appropriate at this point in your career might feel different later on.

This toolkit is intended to be a guide and a reference. Read through it cover to cover if the concepts are new or you want an overall view, or skip to the sections you find most relevant as you seek a better work-life fit.

## Workflex: The Essential Guide to Effective and Flexible Workplaces

The Workflex Guide provides the advice and tools employers need to create an effective and flexible workplace.

A companion piece to this employee toolkit, it features research-based guidance from a host of workflex experts and case studies from companies that made flexibility work for their workforce and for the bottom line. The Workflex Guide will help your supervisor and employer develop workplace flexibility options that can make work work for them, their clients, customers and employees.



# 1

## What Is Workflex?

In this toolkit, we use the term “workflex” rather than terms often used in organizations such as “flexible work arrangements” or “alternative work arrangements” because we believe the word “workflex” will become the new normal. It means flexibility that works for you and your employer. Our definition of workflex includes access to flexibility when it comes to where, when and how much you work. It’s about control; not only control over your work day, but also control over your whole career. It also includes support from your supervisor, coworkers and the organization in using the flexibility your employer provides. Finally, our definition means that flexibility is designed to work for both you and your employer.

## Why Workflex?

1A

Everyone has his or her own reasons for wanting workflex. Traditionally, we think about it in terms of helping manage child care responsibilities like picking your children up from school or caring for them when they’re sick. But it isn’t just about child care. Here are some reasons you may want workflex:

- Manage elder care issues
- Avoid peak commute times
- Reduce commute
- Use alternative transportation
- Work when you feel most productive
- Work when and where you have fewer distractions
- Train for a marathon or other sporting event
- Exercise more
- Maintain or improve your health
- Pursue an interest or hobby
- Have more time to spend with family
- Know your schedule further in advance
- Reduce schedule conflicts
- Be able to schedule doctor, repair and other significant appointments during the workweek
- Volunteer during your normal work hours
- Take an extended vacation
- Care for a sick family member
- And more!

These are all good reasons to want workflex. Once you’ve identified your reasons for wanting workflex, you need to find a schedule and work options that work best for you ... so you can be energized, engaged and successful both at work and in your personal life.

## Reframing Workflex

We've identified the components of effective and flexible workplaces: job challenge and learning; job autonomy; supervisor task support; climate of respect and trust; economic security; and work-life fit including workflex. You may be thinking that workflex is a benefit or an accommodation—basically something your employer “allows” you to do because you don't fit the standard mold for how work gets done. Frankly, yes, some employers still see it that way, too. But the conversation is changing and needs to change.

Today more employers are thinking about how to get the most productivity out of employees. That means less force-fitting employees into the old way of working and more creating new ways to work that enable both you and your employer to succeed.

You will note that we don't use the terms work-family or work-life balance in this Toolkit (except in direct quotes). That's because balance implies a scale where if you give to one aspect of your life (such as work), you take away from the other (your personal life). Studies show that isn't the case. Work can enhance your non-work life and vice versa. We use the term **work-life fit**.

## Why Workflex? (Revisited)

This takes us back to the question of why workflex. Sure you have your own reasons, but there has to be something in it for employers too, right? Absolutely.

Thanks to decades (yes, workflex has been around that long!) of research and experience, many employers now understand that workflex isn't just about being good to their employees. Really, it's also an effective business strategy. Here are some common benefits employers get from workflex:

- Reduce turnover costs
- Make it easier to recruit new employees
- Reduce callouts / absenteeism
- Improve morale / engagement / job satisfaction
- Increase productivity
- Improve customer service
- Improve employee health
- Meet labor and employment law requirements
- Reduce the life stressors that distract employees
- Reduce real estate costs
- Recruit from a wider geographic area
- Reduce environmental footprint
- Maintain operations during disaster situations
- And more!

For organizations, workflex is a way to achieve their goals and at the same time meet employees' need to have more control over their lives. You may want to include these employer benefits in your workflex proposal. (See Chapter 4.)

## Workflex Options

The workflex options outlined on the following pages can help you and your employer achieve the best fit between work and personal needs.



# FLEX TIME AND PLACE

| ARRANGEMENT                     | DESCRIPTION                                                                                                                   | BENEFIT                                                                                                                                                                                                                                                                                                                              | EXAMPLES                                                                                                                                                                                                                                                                             |
|---------------------------------|-------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Flex Time</b>                | Workday starts and ends at times different than the established standard, but you still work the same number of hours per day | <ul style="list-style-type: none"> <li>Gives you more control over your time</li> <li>Allows you to commute outside of peak hours</li> <li>Improves efficiency if you work when you feel most productive</li> </ul>                                                                                                                  | <ul style="list-style-type: none"> <li>Daily flex (e.g., 10 am to 6 pm instead of 9 am to 5 pm)</li> <li>Short-notice schedule changes</li> <li>Summer hours</li> <li>Core hours (e.g., employees required to be present between 10 and 3; start and stop times may vary)</li> </ul> |
| <b>Compressed Workweeks</b>     | Working longer days in exchange for equivalent time off each week or pay period                                               | <ul style="list-style-type: none"> <li>Allows you to commute outside of peak hours</li> <li>Reduces commuting time</li> <li>Provides more days or time off</li> <li>May increase productivity if you work during quieter times of the day</li> </ul>                                                                                 | <ul style="list-style-type: none"> <li>4/10 workweek: four 10-hour days</li> <li>9/80 workweek: 80 hours in nine workdays over a two-week period</li> <li>4 ½ day workweek: 9-hour days Mon-Thurs with Friday afternoons off</li> </ul>                                              |
| <b>Flex Place (Telecommute)</b> | Working from home or other designated remote location for specified times each week, also known as telecommuting or telework  | <ul style="list-style-type: none"> <li>Reduces or eliminates commute</li> <li>Expands the geographic territory in which you can work/ provides an alternative to relocation</li> <li>Limits office-based distractions</li> <li>Allows you to be semi-present for children (or elders) who can mostly supervise themselves</li> </ul> | <ul style="list-style-type: none"> <li>Work from home full time</li> <li>Telework on set days</li> <li>Telework occasionally as needed</li> <li>Traveling employees</li> <li>Work from satellite office</li> </ul>                                                                   |

# CHOICES IN MANAGING TIME

| ARRANGEMENT               | DESCRIPTION                                                                                          | BENEFIT                                                                                                                                                                                                      | EXAMPLES                                                                                                                                                                        |
|---------------------------|------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Shift Trading</b>      | Trading work shifts with coworkers to adjust your schedule                                           | Gives you more control over your time                                                                                                                                                                        | <ul style="list-style-type: none"> <li>Employees swap shifts directly</li> <li>Employees drop shifts into a pool where they can be picked up by coworkers</li> </ul>            |
| <b>Self-Scheduling</b>    | Selecting your own shifts based on pre-set criteria                                                  | Gives you more control over your time                                                                                                                                                                        | Using scheduling software, employees set their own schedules without the need for supervisor intervention                                                                       |
| <b>Uninterrupted Time</b> | Specific days or blocks of time when no meetings are scheduled or when coworkers don't interrupt you | <ul style="list-style-type: none"> <li>Creates uninterrupted time for concentrated work</li> <li>Enables you to schedule your vacations when you know you won't miss important events or meetings</li> </ul> | <ul style="list-style-type: none"> <li>Regular set-aside time when you are free to concentrate</li> <li>No meeting days</li> <li>No meetings after 3 pm, for example</li> </ul> |

## REDUCED TIME

| ARRANGEMENT                   | DESCRIPTION                                                  | BENEFIT                                                                                                                    | EXAMPLES                                                                                                                                                       |
|-------------------------------|--------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Reduced Hours</b>          | Working fewer than 40 hours or fewer than the workplace norm | Gives you more time for family obligations or personal interests                                                           | Part-time work<br>Seasonal time off or part-year work (e.g., summers)                                                                                          |
| <b>Job Sharing</b>            | Sharing a full-time position by two part-time employees      | Creates part-time opportunities in a full-time position<br>Provides more time for family obligations or personal interests | Each employee works 2.5 days per week or other part-time schedules and shares benefits<br>Senior-level executives share a 70+ hour/week job and share benefits |
| <b>Gradual Return to Work</b> | Working less than a full-time schedule following a leave     | Allows you to transition slowly back to full-time work                                                                     | Working fewer days after a leave and gradually resuming full-time work or more hours                                                                           |

## TIME OFF

| ARRANGEMENT                   | DESCRIPTION                                                                        | BENEFIT                                                                      | EXAMPLES                                                                                                                                                  |
|-------------------------------|------------------------------------------------------------------------------------|------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Unanticipated Time Off</b> | Being able to take some time off during the workday to respond to unexpected needs | Allows you to respond to last-minute emergencies                             | Attending a doctor appointment<br>Waiting for a repair person                                                                                             |
| <b>Family Leave</b>           | Being able to take an extended leave from work without losing your job             | Allows you to focus on caring for yourself or your dependent, job guaranteed | Parental leave for birth or adoption<br>Extended leave to care for a sick family member<br>Provides a transition back to work after a military deployment |

## FLEX CAREERS

| ARRANGEMENT              | DESCRIPTION                                                                                                                                                                                  | BENEFIT                                                                                                                                                                                     | EXAMPLES                                                                                                                                              |
|--------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Career Lattice</b>    | Moving up, down or sideways in the organizational hierarchy or taking positions with more, less or lateral responsibility while still maintaining a long-term career plan with your employer | Allows you to “step back” or “step ahead” or “step sideways” as your personal or family responsibilities or career desires change<br>Provides you with broader experiences and perspectives | Declining a scheduled promotion<br>Reducing hours for a period of time<br>Making a lateral move<br>Increasing your time or responsibility             |
| <b>Sabbaticals</b>       | Taking an extended leave from work for the purpose of recharging, studying or experiencing new things                                                                                        | Builds skills<br>Improves creative thinking<br>Helps you reexamine old routines                                                                                                             | Typically any extended leave from four weeks to six months for travel, volunteering, learning, research, goal attainment, personal growth, innovation |
| <b>Phased Retirement</b> | Gradually reducing your hours as you approach retirement                                                                                                                                     | Reduces your work hours rather than an abrupt retirement<br>Provides a higher income than if you leave entirely                                                                             | Part-time work<br>Seasonal or part-year work<br>Job sharing<br>Project work                                                                           |

As you can see, workflex comes in a variety of shapes and sizes. The flexibility you choose should help you achieve your personal goals and do your best work to meet your employer's needs.

In order for workflex to be successful, your workplace must also offer what we call a "culture of flexibility." By that we mean you can use the workflex options above with the support of your coworkers and supervisors, and not experience any negative ramifications for working flexibly. You can read more about that in Section 4a.

## WORKFLEX STORIES

After giving birth to twin boys, Samantha McInturff\* quit her job as director of marketing at WellStar Health System. She felt her life would be too "hectic and crazy" if she had gone back to work.

That doesn't mean the transition was easy. "Staying home was difficult," said McInturff. "I love my boys, but it's a different world. I missed using my education and working on projects."

A few years later, McInturff was having lunch with Amy Adams, a former colleague. Adams was pregnant with her third child and wasn't sure she wanted to work full time anymore either. After some initial planning, they proposed a job share arrangement and were pleased when their supervisor gave them the go-ahead.

Now McInturff works two days a week, and Adams works three. While they may seek full-time work down the road, the job-share arrangement fits their needs right now. "It's been phenomenal," said Adams.

*\*Names in this toolkit have not been changed.*

# WORKFLEX VOICES

“Through telecommuting, flexible work hours and supportive coworkers, I’ve been able to be there for my children when it really counts. Freedom to focus on my family allows me to be more productive during my work hours and results in an overall reduction in stress.”

***April A., product manager, TURCK (sensor manufacturers)***

“Currently I am working from home every Monday. I love my flex schedule because, in my opinion, I get a lot more accomplished without having extra distractions at the office. I feel like it gives me an extra day to focus on any pending issues and makes coming into the office much more manageable.”

***Sam S., buyer, TURCK (hourly employee)***

“My children were involved in sports from the time they were six years old all the way through high school, and because of the flexibility of WellStar, I never missed a game in that entire time.”

***Stanley S., pharmacy, WellStar Health System***

“I ultimately decided to pursue part-time employment, in lieu of a full-time flex schedule, because I am unable to ‘shut off’ during work hours. I wanted to be fully engaged with my children during our time together, and not feel the need to be constantly checking my e-mail and doing work. I have been fortunate to find a part-time job that is able to utilize my skills.”

***Erica M., financial reporting manager, Midwest medical device company***

“Having time off on Sunday allows us to attend church and visit family on a regular basis, instead of having to rotate working Sundays. Also, having a regularly scheduled day off makes it easier to make plans and schedule things ahead of time.”

***Pierre V., laundry team member, WellStar Health System***

“It takes me two hours (one way) to get to work. I work remotely a few days each week, and I do not know how I could actually work without a flexible work arrangement. I had to have my gallbladder removed recently, and it meant four weeks at home. Because I was already set up to telework, I was able to work from home that entire month. It was seamless! My boss didn’t have to worry about assigning my colleagues to cover for me.”

***Jody L., director of marketing, McGladrey LLP***

“I have a flexible schedule so I can give my best in both my personal and professional life. By working part time, I am able to enjoy the best of both worlds.”

***Employee\*\*, Toyota Financial Services***

“Coming back from maternity leave, I was extremely concerned that I would be unable to maintain a work-family balance. My flex schedule has made all the difference. Working from home one or two days a week has made what could be a very challenging situation entirely doable. I have time to do my work and time to see my daughter—I couldn’t be more grateful.”

***Associate, O’Melveny & Myers LLP***

*\*\*In some cases, contributing organizations either elected not to publish employee names or shared feedback that had been provided via anonymous employee surveys.*

# 2

## Workflex and Your Career

In the first section, we outlined a number of benefits of different types of workflex. Chances are, you can think of several more reasons why workflex would be good for you and your employer! That said, workflex isn't right for everyone.

### Common Employee Concerns About Workflex

2A

This section is meant to outline some common concerns about workflex and how to overcome them. At the end of this chapter, you'll find an activity designed to help you think through your own work-life values.

#### CONCERN #1

*I don't think workflex would be available for the kind of work I do.*

#### SOLUTION

We believe that ALL jobs can be designed to create a better work-life fit. Manufacturing jobs can incorporate shift trading and alternatives to mandatory overtime. Retail businesses can use software for self-scheduling and/or sales pattern planning to estimate staffing needs further in advance. Administrative work can be bundled or shared, so that some of it can be done from home.

On the other hand, not every job is appropriate for certain types of workflex. If you work on the floor in manufacturing or retail, flex place (telecommuting) is not an option. If that's something you really want, you may need to redesign your career plans.

If your employer is supportive of workflex, but your current job doesn't provide the flexibility you're looking for, ask about other positions in the organization that do. Talk with your supervisor and create a plan to develop the skills and experience you'll need to transition into a new role.

## **CONCERN #2**

### ***My employer (or my supervisor) won't be supportive of workflex.***

#### **SOLUTION**

It's true, some supervisors aren't supportive of workflex. But more often than not, it's because they can't understand how it could work in their department or team or because they've had a bad experience. It may not be directed toward you, but out of concern for their department or team's performance.

If this is your situation, you have a few options. You can do some research (find case studies online, talk to others in similar organizations) and show your supervisor how other organizations or departments like yours have made it work. Make a business case, showing how workflex will help your organization. Help problem solve. Ask to form a workplace committee around workflex. Or, ask for workflex on a trial basis to assess how it can work best.

Of course, you can look for another job that offers more flexibility. But before you do, speak frankly with your supervisor about your work-life needs, share options that could benefit the department and you, and give him or her a chance to help.

## **CONCERN #3**

### ***I'm worried about the impact on my career advancement if I choose workflex.***

#### **SOLUTION**

Some employees are hesitant to ask for workflex because they fear it will make them look like a "slacker" and hurt their career prospects. In reality, employees tend to find they are more productive when they are working flexibly—due to better focus, reduced work-life stress or reduced commute time.

Unfortunately, we have still not reached total acceptance for workflex. If your supervisor is not truly supportive, choosing a flexible work schedule could limit your career possibilities. You may be passed over for promotions or specific work assignments. You will have to determine for yourself whether you can have both a thriving career and workflex within your workplace.

If you decide to go for it, keep in steady, consistent communication with your supervisor about your performance. Make it clear that you want to move ahead. Volunteer for special projects or committees to show that you are engaged in the organization. Share your performance achievements and ask for continuous feedback. Work with coworkers to ensure your availability when necessary and demonstrate your commitment to the team through ongoing collaboration. Chapter 6 of this toolkit provides some tips for workflex success.

If workflex isn't already an acceptable practice in your organization, you may become a role model for others to have the courage to work this way, and ultimately, an agent for change. If you find yourself in the position to support a broader organizational push toward workflex, Chapter 8 of this toolkit can provide some tips for being successful in that role.

## **CONCERN #4**

### ***What if I want a different workflex option later on?***

#### **SOLUTION**

You will probably find that your desire and need for workflex will change throughout your career. For example, you may need short-term emergency time off or longer-term leaves at various points in your

career. You may want to dial your career up or down—sometimes working a traditional schedule, other times working part time or flexibly. Likewise, your employer may have different needs over time too, such as during a business downturn or expansion. In addition, your employer may add new ways of working flexibly to what it offers.

Once you demonstrate to your employer that you can work successfully with one kind of workflex, you'll probably have an easier time negotiating new arrangements as your needs change.

## **CONCERN #5**

### ***Will workflex impact my income?***

#### **SOLUTION**

Unless you are reducing your hours, there is no reason to suggest (or accept) a pay cut as part of a workflex arrangement. If your full-time work status remains unchanged, your productivity should also remain the same (or improve). So long as you are doing the same amount of work, your compensation and benefits coverage will remain unaffected.

Working a reduced schedule, however, will affect your pay, particularly if you are a nonexempt employee (e.g., you are paid on an hourly basis). Find out if reducing your hours will impact your benefits, too. Cutting your hours may impact your eligibility for health care coverage, retirement plan participation and other employer-provided benefits. Speak to your HR representative (or the person who handles human resource issues at your organization) to fully understand the specific impact of your workflex arrangement for the short and long term before you make it official.

Additionally, if you are considering going part time or taking a career hiatus, recognize that you may experience long-term financial implications. Social Security benefits are based on your average earnings over 35 years. If you've worked longer than 35 years, your lowest earning years are dropped. If you've worked fewer than 35 years, the calculation includes years of zero-income. Those zeros lower your average and reduce your payout in retirement.

Be aware that taking a break from the workforce—or even ramping down to a lower pressure position—can also reduce your future earning potential. Salary and benefits are often based on years of experience, putting people who “step back” professionally at a possible wage disadvantage. Find out the provisions your employer offers to help former employees return to work or step up their careers after a period of stepping back.

However, as the old cliché goes, money isn't everything! There's no right or wrong decision—only what makes the most sense for YOU.

## **Values-Based Decision Making**

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**2B**

It's up to you to determine your personal needs and values. Once you understand what's motivating your decision, you're in a better position to decide whether or not to pursue workflex.

The following factors may have an impact on the choices you make regarding workflex:

- Your work-life values
- Your “need” versus “desire” for workflex
- Your job skills or profession
- Your long-term career goals
- Your finances
- Your employer's needs



# Evaluating Your Workflex Goals

The following questions will help you think through your workflex objectives. Think about what's important to you. What's a "need to have" and what's a "nice to have" when it comes to workflex in your career? Write your answers in the space provided.

## YOUR JOB/CAREER

- 1. What types of workflex could be available for someone in your current job?  
What about someone in your career area?**

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## YOU AND YOUR RELATIONSHIPS

- 2. What are the commitments or responsibilities to yourself and others that motivate you to consider workflex at this time?**

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- 3. What days and times do you need to be available to ... the important people in your life ... yourself ... fulfill other responsibilities?**

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**4. Could you make alternative arrangements for these personal or family responsibilities?**

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**YOUR GOALS AND INTERESTS**

**5. What are your life goals or interests that you could better achieve with a workflex option?**

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**YOUR FINANCES**

**6. How much do you need to earn to meet your financial commitments?  
Could your desired workflex option (e.g., reduced schedule) impact that?**

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**7. How will your desired workflex option specifically affect the benefits your employer provides?**

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# WORKFLEX VOICES

“Most importantly, my flex schedule benefits my family life. I can provide attention to my kids during the day with the flexibility to make up my work during off hours.”

***Bryan R., accounting associate, TURCK***

“I know I’m not advancing as fast as I could be in my career, but that’s okay because my flexible schedule is more important to me. I left a past job because I refused to work 70-hour weeks anymore. Now I have a position that allows me to be involved in my son’s everyday life. Our new president is breathing fresh life into the organization, and I have hope that I can accomplish some great things in my career under her direction—while also having a fulfilling home life as a mom!

***Lori Kaye L., marketing and communications manager, Green Bay Area Chamber of Commerce***

“I recently signed a consultant agreement with a new company, and they advised that I could have the title of ‘Surface Manager’ if I were to relocate (instead of telecommuting). This is quite funny to me because this is exactly the role I will be doing. Titles are not as important as lifestyle choice at this point in my life though, so I will not be moving.”

***Audrey A., vice-president, Aqua Slug Services, Inc.***

“Being able to have a successful career and participating in my children’s lives is extremely important to me. Flexibility allows me to have both!”

***Kayci S., global work-life Web designer, John Deere***

“My flexible work arrangement has allowed me to pursue my master’s degree and advance my career. I would not be successful unless I was working under a flexible schedule.”

***Annah D., marketing assistant, American Foundation of Counseling Services***

“My employer treats me as a professional and has complete trust in my abilities to accomplish my job, regardless of the hours I am in the office. I am continually encouraged to leverage flexibility to the extent I need.”

***Eva W., corporate controller, TURCK***

“I went into this arrangement having established a pretty high level of performance, credibility and trust within my organization. Additionally, my individual department and leaders strongly believe in and champion these flex work efforts.”

***Employee, Toyota Financial Services***

“Ryan rewards employees that provide excellent results, innovation and client service without regard to the hours worked or where the work was performed. This fuels my productivity, efficiency and ambition, while allowing me to devote ample time to my personal life. I take pride in the fact that I work for a community and employee-oriented company that allows me the flexibility to be the father and husband that I want to be.”

***Employee, Ryan LLC (tax services firm)***

# 3

## Requesting Workflex Step 1: Assessment

If you already have a job and want to work flexibly, then the next two chapters will help you prepare your request. If you are thinking about or are currently engaged in a job search, please see Chapter 5.

The first step is to assess your organization and determine how open the culture is to workflex, how many others have requested flex, the request process, whether they've been approved or denied, and the history of workflex. In addition, you need to understand the work environment and how work gets done at your organization. Better knowledge of the cultural attitudes and business requirements and goals you may encounter will help you be prepared to have a conversation with your supervisor. It's also important to evaluate your own work style to make sure that you are ready for workflex.

### Culture of Flexibility

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3A

What do we mean by “how open the culture is to workflex?” In a culture that is very supportive, employees regularly and openly work flexibly so that they don't have to choose between advancing in their jobs and devoting attention to their family or personal lives. In a workflex supportive culture, workflex is the way the organization does business, so you may be less likely to suffer negative career consequences for using flexible arrangements.

But if workflex isn't readily practiced in your organization, you may encounter some concerns and resistance when you make your request. Either way, you'll be more prepared if you spend some time looking into the culture and policies of your organization in the following five areas:

- Human resources
- Employee work styles
- Flexible work precedents
- Your supervisor's perspective
- Type of flex culture



## 1. Human Resources

Visit your organization’s work-life Intranet site to find policies, articles and success stories regarding the use of workflex. You may also find readiness assessments, application forms, etc. that can be helpful in preparing to ask for a workflex arrangement.

If your organization does not have a work-life Intranet site, or if you still have questions, talk with your human resources representative to get an understanding of your organization’s experience with, and overall openness to, workflex. You can keep your conversation on a high-level, avoiding references to your specific interests, in order to get a feel for how openly workplace flexibility is embraced. Or you can ask specific questions about benefits coverage, compensation and other concerns you may have, especially if you are considering reducing your hours.

**What did you find? What questions do you still have? Where are you most likely to find answers to your remaining questions?**

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## 2. Employee Work Styles

Consider the work styles of people in your organization. If a majority of the staff works regular hours and overtime at the office, it may be difficult to find an open ear. Nevertheless, a solid, well thought-out, comprehensive plan—one that outlines the advantages to your employer and you while addressing management’s potential concerns—will make it easier for your supervisor to say yes.

But don’t rely on appearances alone. There may be several team members looking for a pioneer to lead the way. Talk to colleagues within your organization to understand their perspectives on workflex. If you uncover coworkers who are also interested in workflex, you may want to request permission to form a workflex exploratory committee before making your own personal request.

**Who else in your organization is already working flexibly? Who else in your organization would have reason to support a more workflex friendly culture?**

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### 3. Workflex Precedents

Chat with colleagues across the organization to discover situations in which workflex was allowed. Find out what worked well and what was seen as a challenge or failure. Once you know what didn't work well, you can suggest alternative arrangements or possible solutions (e.g., extra communication, new technology).

**Was workflex successful for your coworkers or did it create challenges?**

**What kind of challenges?**

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**If there were challenges, how did management respond? Considering the history of workflex in your organization, how might you address those concerns or prevent similar problems in the future?**

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### 4. Your Supervisor's Perspective

Your supervisor's experiences with workflex will influence his/her openness to your proposal. Has your supervisor ever managed someone working flexibly? If so, was the experience positive or negative? If your supervisor (or someone close to him or her) has had a negative experience, it is important to present how you will address the problems that arose in the past and why the results will be different this time.

Play to your supervisor's style. How does your supervisor respond to new proposals? Is it better to give your supervisor forewarning or not? Does he or she respond to emotion or numbers? Data are typically useful, so you may want to draw on research sources (like those cited in Appendix A) to help make your case.

**What objections might your supervisor have toward a workflex arrangement?**

**How can you respond constructively to those objections?**

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## 5. Type of Flex Culture

The culture of flex varies by organization. Here are four different ways that some approach workflex:

**Formal flex** cultures tend to offer workflex arrangements governed by written organizational policy and/or an employment contract. Formal workflex arrangements are often tracked by the HR department, or whomever handles human resource issues, so your organization can track how many people are using workflex. If you work in this kind of organization, you'll likely have to go through a formal proposal process to request workflex.

**Informal flexibility** is a less systematic way to offer workflex. These organizations may not have a policy that explains your options or the process for requesting flexibility. In this case, your workflex arrangements may be arranged unofficially between you and your supervisor. In some informal flex organizations, workflex isn't formalized because it's just become the way work gets done and is considered normal. In others, workflex arrangements may be more quiet or private in nature.

**Occasional flex** usually doesn't require anything more than a request of your supervisor when something arises and you need flexibility to address it (e.g., working from home when a repair technician is expected, taking the afternoon off to attend a doctor appointment, care for a sick child, etc.).

**Regular flex** refers to an ongoing, planned workflex arrangement where you flex your start and stop times, work from home on Tuesdays, etc. By arranging a consistent schedule of flexibility, you, your team members and your supervisor are able to plan on your ongoing flexibility and arrange meetings, events, etc. based on your schedule.

**What types of flex exist in your organization (formal, informal, regular, occasional or a mix)? How do the current options and culture fit with your workflex interests?**

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Once you've assessed the culture of your organization, you can take the best and brightest ideas from your colleagues to build an effective request. Be mindful of the successful practices you can leverage as well as strategies for addressing the areas others have struggled with in the past.

# Self-Assessment: Performance and Work Habits

As you consider a flexible work request, think about your work style. If you are thinking of flex time, then make sure you can reliably stick to the schedule you select. If you are thinking of working from home, you should be a self-starter—able to take initiative, work independently, deal effectively with the distractions of home life and meet deadlines.

Before you request workflex, take a moment to evaluate whether your own work style is conducive to a flexible schedule. Do you think you'll be able to be successful on a flexible schedule? Have you demonstrated to your supervisor that you can work independently and meet deadlines?

The following assessment can guide you through a self-reflection process.

## Performance and Work Style Self-Assessment



**Rate these questions using the following scale:**

**4** = Strongly Agree **3** = Somewhat Agree **2** = Somewhat Disagree **1** = Strongly Disagree

1. I can manage my work responsibilities by planning ahead. \_\_\_\_\_
2. I can manage my work responsibilities by prioritizing what's important. \_\_\_\_\_
3. I regularly meet deadlines. \_\_\_\_\_
4. When work problems arise, I can problem solve and resolve issues independently. \_\_\_\_\_
5. I am focused and productive when I'm working. \_\_\_\_\_
6. I communicate well with my supervisor and keep him/her informed. \_\_\_\_\_
7. I scored "satisfactory" or better on my last performance evaluation. \_\_\_\_\_
8. I am a team player. \_\_\_\_\_
9. I communicate well with my coworkers and keep them informed. \_\_\_\_\_

**Now rate these questions using this scale:**

**4** = Very Clearly **3** = Somewhat Clearly **2** = Not Very Clearly **1** = Not Clearly At All

- 10. I understand how my organization does or could benefit from workplace flexibility. \_\_\_\_\_
- 11. I am prepared to meet the level of availability and responsiveness required to meet the needs of my organization. \_\_\_\_\_
- 12. I understand how my team's work requirements contribute to organizational success. \_\_\_\_\_
- 13. I understand the results that I am responsible for. \_\_\_\_\_
- 14. I understand that flexibility must work for my coworkers, my supervisor and my organization as well as me. \_\_\_\_\_

**Now add up your point totals and compare your results to the scale below:**

**47-56: You've Got It**

You have the organization, time management and communication skills you need to work flexibly. You may want to share the results of this self-assessment with your supervisor to determine if he/she agrees with your assessment and areas of continued focus.

**33-46: Growing Everyday**

You may be ready to work flexibly. Review areas where you can improve and ask your peers and supervisor to provide ongoing feedback as you begin workflex. Keep communication channels open and demonstrate how workflex is helping you be more effective and productive.

**14-32: Invest in Yourself**

Look for ways to improve your communication and focus. Work with your supervisor for coaching support and help with goal setting. Sign up for time management workshops or classes that will improve your ability to organize and manage your work. Then consider requesting workflex.



# Self-Assessment: Organizational Considerations

Before requesting a flexible work arrangement, consider the impact on your department, team and other internal stakeholders. Flexible work arrangements must not negatively impact the productivity of others; ideally workflex will enhance them.

Keep in mind your supervisor’s primary objectives—what goals does your department or team need to meet? What deliverables must be accomplished? Which customers (internal and external) must be satisfied?

Your flexible work arrangement must support these goals and must be responsive to changing organizational needs (e.g., project deadlines, training, coworker illness, etc.).

When deciding whether a flexible work arrangement will work, consider the nature of your job, how flexibility will help you achieve your current and future goals, and what support systems are available. Consider the advantages and obstacles, and be sensitive to the organization’s needs.

Put yourself in your supervisor’s position and try to answer the following questions.

## What Will My Supervisor Think?



**1. How will the goals of the organization be positively or negatively impacted by my proposed workflex arrangement?**

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**2. Will I be able to meet or exceed my job responsibilities and standards?**

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**3. How will I maintain communication with my supervisor and coworkers?**

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**4. When is it important for me to be physically present to facilitate group interaction, serve customers, complete my work, etc.?**

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**5. What is the business case for my workflex arrangement? How can it address organizational needs and concerns (for more engaged employees, expanded coverage, work focus, etc.)?**

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Understand that your organization's needs may not support the workflex options that you want. If your request is approved, you'll need to initiate ongoing communication with your supervisor to ensure that organizational needs continue to be met.

# 4

## Requesting Workflex Step 2: Making Your Request

“Employee requests were the top reason that prompted organizations to offer workflex.”  
– *SHRM Research: Workplace Flexibility in the 21<sup>st</sup> Century*

In Chapter 3, we provided tips on assessing your organizational culture. Now it’s time to have a conversation with your supervisor about the type or types of workflex arrangement you’re looking for.

In some organizations, this might be as simple as a conversation about your preferred workflex arrangement (and how it can benefit both you and your employer). In other organizations, you may need to prepare a formal proposal that is reviewed and approved by your management. Check with your HR representative or look for information on your organization’s Intranet to learn which approach you should pursue.

In either case, it’s important to consider both your own workflex needs and the needs of the organization when making your request. In this chapter, we help you prepare to make that proposal. In Chapter 6, we provide strategies you may want to include to address common concerns your supervisor may have about workflex.

## Guidelines for Making a Workflex Request

As tempting as it may be to provide a personal reason for your request, it's not a good idea. You may think that your reason is perfectly valid, but what if your supervisor doesn't agree? Instead, frame your workflex request in a way that demonstrates your commitment to maintaining or improving your current level of performance without disrupting the organization's operational needs.

A request for a flexible work arrangement should reflect:

- A well thought out business case that considers the needs of the organization and your coworkers as well as your needs. (Think through how your work arrangement will affect your department or team and your ability to fulfill your obligations and have your department succeed.)
- A commitment to share the responsibility to make a flexible work arrangement successful.
- An understanding that a flexible work arrangement is not an entitlement, but rather, another way of meeting organizational goals.
- A team attitude.

Think critically about how a flexible work arrangement will affect your department or team, your customers (internal or external) and your ability to meet performance goals. Your supervisor may be responsible for determining whether or not flexibility will work within your department or team, or the decision may rest with higher-level managers. He or she should be expected to evaluate your request based on how well the arrangement will help maintain (or improve) the department's ability to meet its business needs.

## Drafting a Proposal

### ACTIVITY



Show careful consideration when crafting a flexible work proposal. If your organization doesn't have a formal proposal template, you can create your own by addressing these questions in your proposal:

### WHY

**How will workflex benefit your employer? How will it benefit you?**

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*Here is where you write the business case for workflex—showing how it will address a business issue and the benefits that could accrue.*

**WHEN AND WHERE**

**What type or types of workflex 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)?**

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*Give your supervisor options if you can. This way your supervisor can work with you to determine an arrangement that works for the organization and works for you. Outline how the arrangements you are proposing might work. Acknowledge that your organization has the right to rescind workflex options at any time, but ask for appropriate notice if you'll need to make alternate arrangements (e.g., changing child- or elder-care plans or adjusting your class schedule).*

**AVAILABILITY**

**Are there specific hours that you must be present to accomplish your responsibilities?**

**Will you be able to continue to meet deadlines and be available for critical situations?**

**Can you make arrangements to be onsite for location-specific activities?**

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*Show that your proposed flexible option can work well with these responsibilities. Develop a plan for work emergencies with backups such as drop-in child care, family assistance and/or teleconferencing.*

**IMPACT ON COWORKERS AND CLIENTS**

**How will others who depend on you receive what they need to accomplish their work?**

**Who will be most impacted by this flexible schedule?**

**Will this improve service in any way?**

**What would have to change in order for this to work for you and your employer?**

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*List the benefits and challenges of this new arrangement as they impact your internal and external customers, employees, coworkers, supervisors and organization. Will you be more productive without workplace disruptions? Will you be more available without a long daily commute? Show a plan for addressing the challenges or demonstrate that the benefits outweigh any negatives.*

**COMMUNICATION**

**Will communication with your team, coworkers, supervisors and customers differ once you are on a flexible schedule?**

**How will people know how and when they can reach you?**

**What are reasonable boundaries you can set that will work for you and your team in the short- and long-term?**

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*If necessary, what communication tools (instant messaging, video conferencing, mobile phone/data plan) will help you connect? However, be cautious against overpromising availability. You may be willing to offer a great deal up front, but that may not be sustainable long term. It's harder to scale back availability, once expectations have been set.*

**PERFORMANCE**

**What are your performance goals this year?**

**How will you meet job expectations in your new flexible arrangement?**

**How will your supervisor know you are getting the work done?**

**How and when will you and your supervisor assess the effectiveness of your arrangement?**

**What performance measures should you and your supervisor use to demonstrate success?**

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*Be as specific as possible about how you and your supervisor will evaluate your performance and the success of your workflex arrangement.*

## **Trial Period**

If you feel that your supervisor will be reluctant to make a long-term commitment to a workflex plan, you may want to suggest a three or six-month trial period. Agree to a specific time frame as well as the metrics you will use to evaluate the success of the arrangement. Build in an ongoing review process so that you can make changes to the arrangement as problems arise. Supervisors tend to be more open to saying “yes” if they know they aren’t signing on to a “forever” situation and if they are clear about the metrics used to evaluate the arrangement.

**CONNECTIVITY (FOR TELEWORKERS)**

**Do you have reliable high-speed Internet access?**

**Do you have a phone service/plan that can accommodate lengthy conference calls?**

**Do you have the equipment/technology to work offsite?**

**Will you need to invest in new equipment?**

**Are you looking for your employer to reimburse expenses?**

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*Many organizations will ask remote employees to provide their own computer, high-speed Internet access and phone line. These are already fairly common in American households, and some employers feel that providing this equipment would be akin to subsidizing your personal technology.*

*If you will be working remotely full time, your organization may supply a computer or pay for high-speed Internet access. Consider data security, information backup and access to organization data as well. Ensure security and backups by working directly through your organization's server, provided your organization has a VPN (virtual private network). Alternately, you could access your desktop remotely with a subscription tool like GoToMyPC. Be sure to check with your organization's IT department or team to better understand their telework requirements.*



# If Your Request Is Denied

Even if you present a very thorough proposal, there's always a chance that your request will be denied. If you were denied, ask your supervisor to explain his/her reasoning. Ask about the possibility of revisiting the request again in the future and what activities or performance behaviors you'd need to demonstrate in order to increase your chances for approval in the future. Be sure to leave your meeting with a date set for a future discussion.

With this information, you can determine whether to revisit the issue, drop the request altogether or begin looking for a new position that offers the flexibility you seek. No matter the reason for your request being denied, you have a responsibility to your employer and your coworkers to maintain a positive, cooperative spirit at work. Maintain a good attitude and try to remain as objective as possible as you consider your next steps.

Note that some organizations have a process in place through HR (or the person who handles human resource issues or an ombudsperson) to deal with denials. Find out if your organization has this process and place and if so, use it ... but only after you have had a chance to marshal a constructive response to the denial.

If you have been denied flexibility, consider the reason for the denial and the best response for you, your goals and your employer. Here are three possible reasons and constructive responses:

## REASON 1

### *Flex Isn't Possible for Your Position*

Sometimes your employer's operational needs cannot provide flexibility for every position. Your supervisor may not be convinced that your work will be able to be accomplished by working flexibly. Ask others for ideas about how flexibility could work for your position. Consider a different type of workflex arrangement that might work in your role.

It really may not be possible for you to work flexibly in the arrangement that would work best for you. If that's the case, find out if the organization has other open positions that would enable you to work your preferred work arrangement. If you find those positions, decide whether you would like to transition into one of them, and talk with your supervisor or HR about the skills you would need to get there. It may also be the case that you need to begin looking for a new employer. (See Chapter 5.)

## REASON 2

### *Your Supervisor Is Unsupportive*

If your supervisor isn't supportive of flexibility, you have two options. You can work to persuade him or her that flexibility can work or you can look at alternate career opportunities in another department or organization.

If you are convinced flex could work for your position, consider asking your supervisor for a joint meeting with another relevant decision maker in your organization (such as HR, the person who handles human resource issues, vice president, etc.). This should be presented as a joint problem-solving meeting, not an opportunity to go over your supervisor's head. Ask your supervisor if he or she would be open to such a conversation and then approach the other person.

If there is another supervisor who promotes workflex, you can also ask for a joint meeting with him or her. Ask your supervisor to meet with his or her colleague to discuss workplace flexibility and find out what makes flexibility work well.

### **REASON 3**

#### ***Performance Issues***

Have a frank discussion with your supervisor. If performance issues have been a concern, work to set measurable objectives that will demonstrate your effectiveness at work. Once you meet those objectives, revisit your request for flexibility. See Chapter 6 for more on managing expectations.

# 5

## Job Search: Finding Workflex- Friendly Employers

If you are engaged in a job search, you have the opportunity to seek out employment from an organization already committed to flexible work. If an employer markets their commitment to workflex, let them know that's part of the reason you applied for a job. It's a small but meaningful way you can strengthen the message that workflex matters!

### Searching for a Workflex-Friendly Employer

Use the following task lists as you consider potential employment opportunities.

ACTIVITY



#### IF YOU'VE IDENTIFIED SOME POTENTIAL EMPLOYERS

Complete



Search employer Websites for recruitment information. Some organizations will highlight work-life benefits and flexible work options because it makes them attractive to job candidates.

Consult with people who work for your potential employer or look online at employee review sites, such as Glassdoor.com, for an inside look at how flexibility is really being utilized by employees.

Use social media (Twitter, LinkedIn) to find former employees and ask questions about work culture. (Always be professional and only ask questions and make comments using social media that you would be comfortable having an employer see now or in the future.)

Look for articles about the organization's workplace culture.

## IF YOU'RE LOOKING FOR ANY WORKFLEX EMPLOYERS

Complete



Many award programs exist to recognize organizations that provide work-life benefits and flexible work options. If you're not sure where you want to apply, you might start by browsing lists of award winners. Some more well-known programs include the Sloan Awards for Excellence in Workplace Effectiveness and Flexibility, *Working Mother* Top 100 and *Fortune Magazine's* Best Places to Work (among others).

You can search the interactive Sloan Awards database at [www.whenworkworks.org](http://www.whenworkworks.org).

Check with your SHRM chapter. They may coordinate Sloan Awards for your region.

## During an Interview

Before you go into an interview, decide how important workflex is to your employment decision. If it's a priority for you, be open with HR and other organization representatives with whom you meet. It's to everyone's advantage for you to be in a job that provides the best fit for your work-life needs.

If workflex is more of a nice-to-have than a have-to-have, wait until further in the interview process to inquire about the flexibility of the position. Ask how many people work flexibly in the department or team in which you'd be working and the types of arrangements that work best.

## After an Interview

Arrange to talk with current employees in the team or area in which you would be working. Ask them what it's like to work there. Ask questions that indicate the organization's commitment to areas that we've identified as being part of an effective and flexible workplace. These include job challenge and learning, job autonomy, supervisor task support, climate of respect and trust, economic security and work-life fit.

## WORKFLEX STORIES

Susan Soderlund, an administrative assistant in Green Bay, Wisconsin, told potential employers up front that she needed a flexible schedule in order to care for her mother. "When I interviewed

for a position, I would say, 'I have an elderly mother and she is a priority. If that's going to be an issue, then I can't take this job,'" she recalls.

Soderlund turned down a job offer from an organization that seemed less than enthusiastic about her need for workflex, and ultimately landed a position that allows her to take time off on short notice and shift her start and stop times in order to respond to her mother's needs.

# 6

## Flex Success Strategies

The work world is changing rapidly, and that shift is requiring new skills from today's employees. To be successful with workflex, you need solid communication skills, the ability to self-pace and work independently, good problem-solving skills and a sense of accountability. In successful workflex cultures, employees and supervisors find ways to work together to improve both individual and organizational performance. It takes a positive team attitude, strong work ethic, clarity around job expectations and a LOT of communication.

The sections that follow include best practices that you may find helpful as you begin a workflex arrangement. You may also want to include them in your workflex proposal. (See Chapter 4.)

### Communication

When developing flexible work arrangements, it's important to determine when, where and how you will be available to your supervisor, coworkers and customers (internal and external).

Talk about how accessible you need to be when you are not physically present at work. Clearly, there are personal issues, as well as business ones, to consider. Use the questions on the following page as a guideline, and then review with your supervisor to create a communication plan.

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6A



# Creating a Workflex Communication Plan

## HOW AND WHEN TO REACH YOU

Complete



Decide if and how you will be accessible when you are not in the office. Take others' needs into account when you consider these decisions.

Decide when you will be available for calls—which days, what hours? Are there specific hours when you must be available? Are there specific hours when you can't be available? What will you do when others must reach you?

Inform others on how and when you can be reached (cell phone, home phone, e-mail, etc.).

## CUSTOMERS/CLIENTS

Complete



Discuss with your supervisor the potential impact on your customers or clients and decide whether or not to notify them of your workflex arrangement.

If appropriate, determine the best way to communicate with your customers or clients such as when, where and how you can be reached, and who can assist them in your absence.

If there are new or additional people with whom the customer will be working, set up a meeting to make introductions.

## MEETINGS

Complete



Agree with your supervisor on when staff meetings will be scheduled.

Identify some contingency plans in the event a meeting is called on short notice.

Decide if and how you will be available for meetings on days when you are not working (e.g., in person, via phone or video conference).

## INFORMATION

Complete



Inform your team members where critical information is kept (e.g., filing system, computer access, addresses and contact information, your calendar).

Make sure necessary computer files are shared with others who might need access to them.

If you are working away from your worksite, determine how you will access information you might need.

## FEEDBACK

Complete



Encourage your supervisor, coworkers, customers or clients and others to give you feedback on how the new work schedule is working for them.

Establish regular check-in meetings with your supervisor—either face-to-face or through phone conferences, so you can talk about what's working, what's causing challenges and how to resolve them.

# WORKFLEX STORIES

“I know it seems simple,” said Jeffrey Chorvat, an HR supervisor with a multi-billion dollar energy company, “but letting managers know when and where you are and how to reach you is critical.”

“This helps with the comfort level, and if a question comes up while you are out—they can handle it,” he said.

# WORKFLEX VOICES

“To make a flexible arrangement work, you must be disciplined, organized, and have strong and proactive communication with your clients, coworkers and supervisor. There need to be clear expectations and consistent ‘check-ins.’ These same skills apply to working with your family who may need some guidance and clear set expectations on your work hours and times you can’t be bothered.”

*Jessica H., West Coast client relations director, Bright Horizons Family Solutions*

“I have made strong efforts to ‘be present’ and maintain some form of effective communication with my team and leaders at all times. Also, I understand that I truly need to be flexible with regard to my arrangement, and have been willing to flex my schedule, as needed, to meet the business needs of the department/organization.”

*Employee, Toyota Financial Services*

## Building Team Relationships

As we talk about communication, you may be thinking about logistics, status updates and all the necessary information exchange that goes into getting work done. But for workflex arrangements to be successful, your communication needs to go beyond your supervisor. You need to build and maintain relationships with your coworkers as well.

In a traditional workplace, it's easier to build bonds as you greet each other in the hallway every morning or chat around the coffee maker. Those incidental interactions may seem small, but they go a long way toward building essential connections.

If you are working a reduced schedule, you may feel too rushed (or too focused) when you are at work to take time out for small talk. Attention to your work is important, of course, but if you avoid connection with coworkers over the long term, your effectiveness may suffer.

If you are a teleworker, you will have to be even more deliberate about building team relationships. If possible, arrange to spend some time at work—at least a couple times each month, or every few months, depending on your situation. Face-to-face interaction is the easiest way to build those interpersonal connections.

If for some reason you can't make it to the main workplace for an in-person visit, ask your supervisor or tech person about video conferencing options. There are many low-cost (or even free) video conference tools available on the market today, such as Skype.

### WORKFLEX VOICES

“This system allows freedom, but also demands that employees become more accountable for their work and deadlines, which I believe makes for stronger employees with better work ethic.”

*Employee, Ryan LLC*

“At least once a month, try to go out and do something with your coworkers. Community is important, and I think it affects both group performance and individual performance.

*Paul C., director of technology operations, TCP*

“Keeping positive is key to helping others understand your work situation and to also avoid misunderstandings or any jealousy . . . Try not to feed into this. Keep abreast of latest statistics/research on both the benefits and hurdles of various work styles. I subscribe to the model that work performance should be results based and not based on the number of hours you sit in an office.”

*Audrey A., vice president Aqua Slug Services, Inc.*

“As part of my telework arrangement, I have been flexible with requests to travel various times a year to meet with my team. I have also worked to flex my hours in order to meet my customer needs and leverage video chat in order to build relationships with my internal customers.

*Julie W., regional performance consulting services specialist, John Deere*



Here are some additional tips to help you stay connected to your team:

### **Build Time into Your Workweek for Some Social Conversations**

Maybe you want to call your supervisor regularly just to touch base on a more informal level. And, at the start of a meeting, ask your coworkers for the latest news—find out what’s up at the office or what they did over the weekend.

### **Be Visible**

Use your organization's collaboration software (such as instant messaging or video conferencing) so your home office colleagues can always see when you’re at your desk. Share a picture of yourself in your remote workspace. Encourage your supervisor to post your picture in a visible place, so everyone remembers you’re part of the group. We even know of a company that tacks pictures of remote employees to the conference room chairs when team members join a meeting via conference call. Don’t be afraid to suggest your work group does the same!

### **Participate**

Additionally, express an interest in participating in office social events, even if you work remotely. If it’s crazy Hawaiian shirt day, wear one—and send a picture to the in-office team. If everyone is decorating their cubicles for a holiday, decorate your desk and send in a snapshot.

Potluck day? Share your favorite recipe and say, “This is what I would have made if I was there. Enjoy!” Have fun with it and show a commitment to getting involved.

Remember, relationships are integral to team effectiveness and communication is at the core of teamwork. Fundamentally, you have to figure out how everyone on your team works best together, and you have to communicate to do that.

## **WORKFLEX STORIES**

When advertising account executive Jaimy Szymanski left her employer’s home office in Oshkosh, Wisconsin to work remotely from Davenport, Iowa, she found that video conferencing helped her be more productive.

“Transitioning from in-office work to a virtual environment was a lot easier than I expected. I think that the shift feels easy thus far because my role hasn’t changed significantly since my departure. I still maintain the same projects and workload as previously, and I see my coworkers on a near-daily basis ... Well, virtually at least.”

We have found that, for team meetings and long-distance client meetings, video chatting is a really valuable communication tool. The tool we use allows for up to six video chatters at a time, which is great for us, since we do a lot of multi-person online meetings.

Video chatting has made it much easier to perform team tasks than instant messaging or phone conversations. It also has a lot of personal benefits. For example, I can actually see if my coworkers are laughing at my jokes, rather than them typing an “LOL” after my witty remarks. That’s valuable stuff. Plus, I’m a people person and love to socialize, so having the option to video chat can be an effective morale boost during a long workday from home by myself.”

## Working as a Workflex Team

In the past, flexible work was seen as an accommodation or a perk and was something negotiated between an individual employee and his/her employer. But those ideas are rapidly changing. In many of today's forward-thinking workplaces, workflex is part of a team work style. Everyone works together to create a work environment that supports everyone's work preferences and schedule needs.

Here are some questions that will help you assess how you and your team are managing in a workflex environment.

### ACTIVITY



## Workflex Check-In Questions

**1. Have we missed any opportunities or missed a deadline as a result of workflex?**

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**2. Is my workflex arrangement creating an extra burden for any of my coworkers?**

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**3. Am I aware of any whispers, rumors or negative complaints about my workflex situation? Are these negative comments based on issues I can fix (e.g., better communication about my availability or performance, or the need to build stronger relationships with each other)?**

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**4. Is communication and access to information working well, or do we need to make adjustments? Do we have enough face-to-face time?**

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# Managing Expectations

If you're responsible for client or customer service, you already know how important it is to manage expectations. That means delivering on your promises, ensuring deadlines are met and monitoring customer satisfaction.

Successful employees do the same thing with their internal customers (supervisors, coworkers) at work. For flexible workers, who may be under extra scrutiny, managing these expectations is particularly important. If your assumptions about your job responsibilities and performance don't match with your supervisor's or your coworkers', your career could take a hit.

When managing expectations with your supervisor and coworkers, you need to build transparency and clarity around your responsibilities and performance. Here are a few tips:

## Find Measurable Results

Look for ways your job responsibilities can be measured. Instead of "managing public relations," for example, identify the outcomes you need to achieve. Work with your supervisor to retool your job description in a way that identifies results. Best case scenario, those results will be measurable or quantifiable in some way and it will be clear to all involved whether those results have been met or not.

## Define Objectives

Whenever you take on a new project, be sure to clearly identify your objectives. Repeat back to your supervisor what you understand your role to be. And don't be afraid to share with your team members what you need from them to get the job done, and encourage them to tell you what they need to do their job as well. Review priorities and deadlines and talk about what to do if a project isn't going according to plan.

## Communicate

For long-term projects, plan to communicate status updates. If your team doesn't use project-tracking software, you might consider flash reports. Flash reports are quick daily or weekly updates that outline a) what you accomplished, b) what you're going to tackle next and c) what you need from your team members to move forward. Always be upfront if it looks like you're going to miss a deadline, so the team can prepare or find a solution.

## Be Realistic

Above all, don't promise more than you can realistically deliver. If you consistently underestimate how long a project will take, build extra time into your estimate. Or, make a habit of tracking your activity so that you have records you can refer to when setting deadlines for future projects.

## WORKFLEX STORIES

Cynthia Calvert, author of *Flex Success: The Lawyer's Guide to Balanced Hours*, said employees need to combat the stigma associated

with flexible work arrangements head on. Instead of waiting for challenging assignments to be thrown your way, be proactive in volunteering for them.

"You need to let your supervisor know you are available on occasion (because if not) what happens is the employee gets marginalized and that becomes the kiss of death," she said.

## Know Your Record

If you're able to put measurements in place, you will always know how well you're performing against expectations. If you can't find metrics for your particular role, you'll need to get deliberate about performance check-ins. Have a regular dialogue with your boss around the issue of performance standards. For a real grasp on your strengths and areas of opportunity, you might even ask to initiate multi-person reviews, known as 360-degree performance reviews among your peers. Or, less formally, just go ahead and ask your peers how you're doing.

Managing expectations is an important part of career success. Make it a habit to clarify and communicate responsibilities for overall team success.

6E

## Staying Visible and Promotable

Right or wrong, employees who work flexibly may be under extra scrutiny or may have less visibility and be overlooked: "out of sight, out of mind." Work with your supervisor to set clearly defined, measurable benchmarks and agree on expectations so that you can demonstrate success.

Clearly communicate your capacity to take on work, both your limits and your ability to expand your responsibilities. Something as simple as sending weekly updates, even unsolicited, demonstrates you are actively working toward organizational goals and achieving results.

Recognize that flexibility is a two-way street requiring both employees and supervisors to be adaptable. If your regular day off is Friday, and the organization is hosting a picnic, you may want to make the extra effort to switch your day off that week and join the party.

On the flip side, many flex employees need to consistently, and politely, remind coworkers of their schedule, since coworkers don't always remember. Be clear about your inability to make a meeting if your schedule conflicts, and rather than taking it personally, accept that it may take some time to "bring them up to speed."

Post your calendar on the door to your workspace and include your work-from-home days or days off. Better yet, create a shared calendar so everyone can keep track of each other.

## WORKFLEX VOICES

"When I first began working from home (which is only one day a week), I can't count the number of times I heard 'Oh, that's right, you're off on Fridays.' I start my day with an e-mail to my department coworkers, advising them of my schedule of calls for the day as well as any projects I'll be working on that might involve them. There is some truth to the 'out of sight, out of mind' phrase. Staying connected and involved in what's going on with your work team is important."

*Shirlee S., employee benefits manager, Sonoco*

"I pretty much try to talk to each of my coworkers at least once per day."

*Mark H., former director of content development, Winning Workplaces*

## Setting Boundaries

In today's work culture, the line between our personal and professional lives can get pretty blurry. This can be a particular challenge for flexible workers.

Perhaps you've carved out some personal time during traditional office hours, but need to monitor voicemail and e-mail in case an emergency arises. This can quickly lead to a scenario in which you're "always on"—you're connected to the office and working, even though you've planned to be away.

For some people, this continual switching between work and personal obligations is a seamless, comfortable process. For others, it creates feelings of overwork and exhaustion.

Be realistic about your energy patterns and workload and set boundaries accordingly. If you're feeling overworked, do some self-analysis, work with a career coach or find someone who can help you think through the situation.

Work with your supervisor to set appropriate boundaries. Perhaps you don't need to check e-mail when you are away from the office, but your team will call you if a serious issue arises. Work with your family too to set boundaries about work time and distractions, particularly if you will be working at home.

### WORKFLEX STORIES

While working as the senior manager of talent acquisition at Sara Lee, Emily Ruby reduced her workload to 60%. Here are some of the boundary-setting lessons she learned:

"For me, it was about being realistic about my workload. It's pretty easy to fall back into taking on more projects. The biggest challenge is learning to say no ...

We have a BlackBerry/cell phone landing that sits on the back porch, and we don't let them in the house. I don't carry it with me. I try to physically avoid it. Of the two days I'm off, at

least one day I will check and do a scan that maybe takes me 30 or 40 minutes. If a problem crops up, then yes, I might be working an extra half day to address it ...

You have to be discerning about the meetings you take. Rehearse how you will say no to non-essential meetings. Literally practice how you will say it ... "You know, I'd like to attend, but I'm off those days. Can you send me some notes or can we meet up afterwards to review?" ...

I allow myself to work extra on the days I'm working. If I need to stay late, I will do it on the days I'm in ...

You have to keep in perspective that your contribution shouldn't be measured in volume of hours. It should be measured in quality of work."

# Setting Up a Home Office

If you will be working from home with some regularity, your employer may require you to sign a contract that stipulates requirements for workplace safety and information privacy. But even if you aren't required to sign such a contract, it's a good idea to get your work area in order to ensure maximum productivity.

## Dedicate a Work Space

Create a specific work space free from distractions or family public areas. Your desk and work area should be maintained in a safe, hazard-free, ergonomic condition.

## Establish Boundaries

Make sure everyone understands when you are working. Close a door or post a sign to indicate that you are dedicating your time to your employer. The same goes for friends and family outside the home. Be clear that just because you work from home, it does not mean you are available for personal phone calls, errands or babysitting.

## Storage

Keep your work environment in the same neat and orderly fashion that would be expected in any traditional office environment. Have a dedicated place for office supplies and work files—separate from your household files. It's a good idea to have a lockable filing drawer.

## Security

Remember, the products, documents and records you use and/or develop while working remain your employer's property and are subject to organizational policies regarding confidentiality and authorized access.

Protect customer and organizational confidentiality in your office environment by keeping your work area neat and secure in accordance with organizational confidentiality policies. Take any necessary precautions to prevent unauthorized access to organizational systems or information, whether in hard copy or electronic form.

Ensure that approved anti-virus software is current for all the computers you use for work.

## WORKFLEX VOICES

"You will undoubtedly miss that person-to-person contact you had in your regular office environment. Your phone and a Webcam can be vital tools to help you feel as connected as you were before. When communicating via e-mail, be clear about project expectations and deadlines, and encourage the same from your coworkers."

**Mark H., former director of content development, Winning Workplaces**

"When I work from home, I like to dress as if I were going to the office. No pajamas, no television, no personal social media. It's too easy to be distracted and forget you are 'at work.'"

**Erika B., Creative Publishing**

"Have some sort of backup. Yesterday my Internet wasn't working, but I was able to use my cell phone to get my e-mails and instant messenger to communicate with the team."

**Tabula L., director of operations, TCP**

# 7

# Adjusting a Flex Arrangement

Workflex must meet the needs of both you and your employer. If business needs change, your employer may need to adjust your workflex arrangement.

## Notice and Transition Time

7A

### Terminating Workflex

The reality is that your employer is not legally obligated to provide you with workflex options\*—even if you worked flexibly in the past or other employees in similar positions work flexibly. And while you can expect to be given reasonable notice if your workflex option is going to change, there is no clear legal precedent requiring your employer to do so.

Discuss the possibilities with your supervisor at the outset of your arrangement. How much time would you consider “reasonable notice” to make a long-term schedule adjustment? Help your supervisor understand your needs so he or she can better plan for possible business fluctuations.

If your workflex option is being terminated, try to maintain a positive attitude. Work together with your supervisor to ensure a smooth transition back to your previous work situation, or explore an alternative workflex option, if available and appropriate. After the decision to end the flexible work arrangement has been made, you should develop a transition plan and notify coworkers and customers of the change in arrangement.

### Blackout Dates and Suspensions

Some organizations/departments may implement blackout dates when workflex options are temporarily suspended due to heavy workloads. Ideally, these blackout dates are predictable and communicated to employees well in advance.

If your supervisor is suggesting a termination of workflex because of workload or for staffing reasons, suggest a temporary suspension until business demands level out. Your supervisor may not be thinking of workflex as a seasonal or part-year option, but you can help demonstrate that workflex options can be fluid and responsive to changing organizational needs.

*\*Employers may be legally obligated to provide workflex to employees covered by the Americans with Disabilities Act.*

## “Flexible” Workflex

We always encourage employees to have more immediate back-up plans in place so that they can adjust to their employer’s rapidly changing needs. For instance, could you put your flex schedule on hold for a day to attend a training, cover for a sick coworker or attend a client meeting? Plan for contingencies so that you can be “flexible” with your workflex schedule. Try to be creative and consider the full variety of workflex options available when dealing with new situations. For example, high traffic commutes can be avoided through both remote work and adjusted start/stop times.

Being rigid in your flex requirements can send the wrong message to supervisors and coworkers. While setting boundaries and reminding others of your schedule can help them plan around your workflex, sometimes you’ll need to adjust your schedule to respond to the needs of your employer. It sends a strong message that you recognize flex is a two-way street and are willing to work with your employer so that workflex is a win-win.

### ACTIVITY



## Contingency Planning

**1. What responsibilities do you have that could be impacted by a change in your workflex arrangement?**

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**2. What are some possible back-up plans to cover those responsibilities (friends or neighbors, paid services) if you need to alter your work plans for a few days?**

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**3. What sort of long-term arrangements would you need to make if your workflex option was terminated and how long do you think you'd need to make them? Could you find another workflex position within the same organization or elsewhere?**

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## No Position Protection

Unlike the Families and Medical Leave Act (FLMA) that allows certain employees to take job-protected leave for family and medical reasons, few protections are available for workflex. (Employees covered under the Americans with Disabilities Act may be protected.) For instance, if you negotiate part-time work or a compressed workweek, your employer is under no obligation to allow you to return to a full-time or regular schedule. Although in our view, they should be “flexible,” not rigid. As a rule, we see reduced work hours as including the possibility of returning to full time as the organization’s economic situation permits. (See Appendix B for more information about employment laws.)

Recognize that your supervisor may have negotiated schedule changes with other employees or even hired additional staff to respond to your workflex request. As always, workflex must meet the needs of both the employer and the employee, and it may not be reasonable to expect your supervisor to readjust especially quickly if your workflex needs change.



# 8

## Building Support for Flex

Most of this toolkit deals with your individual pursuit of workflex. This section is for those of you who are looking to be leaders in developing a stronger, overall culture of workflex support.

### Making Connections

Getting others involved—early—is one of the keys to success with workflex. There are lots of possible partners in the effort to create additional flexibility. Taking the time to cultivate a group of willing allies and engage possible skeptics is important. Here’s how you might think about the early engagement process:

8A

### Engaging Leaders

- 1. Make a list of people in your organization who are champions of diversity, employee engagement or even general workplace improvements. Consider people who manage others as well as those who are influential, individual contributors.**

ACTIVITY



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*This is a list of likely allies—people with whom you can start to share ideas, who will provide you with insight into the culture and getting things done and who will likely help because they believe it’s the prudent thing to do to make your organization a better place. They will probably be pleased to be included. You can both learn from each other about how to make workflex a success.*

**2. Make a second list of influential and respected skeptical people who often raise objections to new approaches to work or the workplace.**

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*This list may be more challenging. Get their feedback early because having influential and skeptical people participate in the process (as opposed to being recipients or opponents of the process) should create a level of ownership and investment in project success. It is helpful to be open about why you are choosing them: that you are intent on creating the best possible solutions for your organization and recognize that a variety of viewpoints need to be considered. Ask them to be critical, give you all the reasons why the proposals the group is suggesting for flexibility won't work and to suggest what will work.*

**3. Now select a senior leader or leaders to be sponsors of your effort. A number of organizations have found that it is useful to have “unexpected” leaders as champions, such as the chief financial officer or a supervisor in a traditionally 9 to 5 team. If you don't have access to senior leaders, ask a manager to help you.**

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*If your organization discourages formal working groups, perhaps you can pull together a small group of individuals to help you informally. The structure is far less important than the act of involving the right people early.*

## Creating an Employee Resource Group

Another way to further flexible work practices is to create an employee resource group around workflex or work-life issues (working parent, part-time and telework groups have been established in many organizations). Employee resource groups can help support workflex by bringing people together around a common set of interests. These groups become a place for employees to find coaching, problem-solving and clarification around workflex issues.

If you have a person who oversees diversity and inclusion or human resource issues, he or she may be an ideal person to oversee your employee resource group. Or, there may be another person who can serve as a champion.

Position this group as a resource and sounding board that can help leadership strengthen work-life options. Your executives may find it's a great tool for better understanding employee concerns and "floating" new ideas.

## Getting Employees' Ideas Heard

In a number of organizations, a structure is created to surface employees suggestions for improved products and services. Increasingly, employers are looking to employees to make suggestions to improve the work environment, including workflex. If no such structure exists at your organization, set about creating one. This can range from a suggestion box, a "jam" where employees make suggestions to solve organization problems or an "innovation" process where one new idea is tried monthly.

## Sharing Success Stories

Another common tool for promoting workflex is to share employee work-life success stories. In large organizations with established work-life advocates, it's common to find these stories on your organization's Intranet or in a monthly newsletter. Smaller organizations can leverage the power of storytelling, too!

What you do will depend on the time you can allocate to the project and the resources you have at your disposal. You might ask employees to submit their own stories via e-mail or conduct a contest to collect video testimonials. Or, if your organization conducts an employee engagement survey, you might be able to glean anonymous testimonial stories from the responses.

Think about whether a contest would work at your organization. If lots of employees work flexibility, but telework is less common, you might ask employees to submit photos of what they do during their flexible work time e.g., exercising, walking the dog, coaching a child's sport, avoiding peak traffic, volunteering, etc. National Work and Family Month in October is another opportune time to highlight the benefits of workflex!

Sharing these stories will remind everyone in the organization that workflex is available and has value. In some cases, these stories provide insight into how a particular team found a creative solution to make flexible work possible. At other times, these stories highlight the value workflex brings to recruitment, retention, productivity, customer service or other areas of the organization.

# WORKFLEX STORIES

To promote taking vacations, KPMG has held vacation photo contests with prizes for winners.

One year, in honor of Telework Week in February, Citrix asked its employees to post photos of their remote work space to a Flickr album. The project (which helped put a fun, personal face on the organization) reinforced the notion that Citrix was committed to remote work.

## Conclusion

When it comes to workflex, the future looks bright. Organizations everywhere are recognizing the bottom-line benefits of flexible work.

For many employers, flexible work experience will even be considered an asset. As work teams are increasingly dispersed across different locations, organizations need employees with remote collaboration skills—including the ability to communicate, manage projects and build consensus with a dispersed team.

As you build your career, highlight your skills in adapting to this new way of working. One day soon, the ability to work with flexible teams will become a “must have” skill for new supervisors and employees alike.

In the meantime, evaluate your workflex goals and then be honest with your supervisor. Have a two-way conversation and talk about what’s important for the success of both you and the organization.

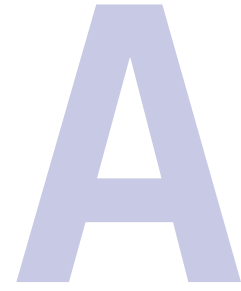
Your employer is interested in retaining staff, not burning people out and dealing with high turnover. If your work-life pressures are increasing to the point where you’re contemplating quitting, you owe it to your supervisor and yourself to discuss those challenges.

Don’t wait until an exit interview to say something. Give your supervisor an opportunity to help. Give your organization an opportunity to embrace workflex!

## Resources

For additional material to support for your workflex request, here are some resources we recommend:

- [Guide to Bold New Ideas for Making Work Work](#)
- [SHRM Workplace Flexibility in the 21st Century: Meeting the Needs of the Changing Workforce](#)
- [FWI Business Case for Workplace Flexibility](#)
- [When Work Works Website](#)



# Appendix A: Workflex in Today's Work Culture

The following section is designed for those of you who want to “dig deeper” into workflex issues. This section talks more about the business case for workflex (in other words, how your employer benefits) along with some public policy issues.

When the term “family-friendly workplaces” was coined, flexible work options were seen as assistance that employers could provide to employees to help them manage their work and personal lives, especially around child care and elder care. Today, we have come to think about workplace flexibility differently—we consider it a business strategy that can help all employees and organizations succeed.

## Strategy, Not Accomodation

Research from Families and Work Institute (FWI) shows that when employers and employees partner in finding flexible ways to work, both benefit. Working flexibly can not only help employees manage their work and personal responsibilities, it can also enhance an employee’s effectiveness on the job. ([See The State of Health in the American Workforce](#), FWI, September 2011.)

For instance, FWI’s research finds that employees with flexibility are:

- more engaged in their jobs and committed to helping their organizations succeed;
- more likely to plan on staying with their employer; and
- more satisfied with their jobs.

In addition, workflex creates other benefits for the employee: employees who have greater access to flexible work options have significantly better mental health than other employees. Clearly, flexibility can be a “win-win.”

So why don't more employees have the choice to work more flexibly? And what steps can you take if you want to increase the flexibility in your work life?

One reason that flexible work options such as flex time may meet with resistance is that they challenge some long-held assumptions about work such as “presence equals productivity”—an assumption that doesn't hold up in an economy that is increasingly turning to results, not just time on the job, as a measure of productivity. (See [Reframing the Business Case](#), FWI, 1998.)

Another assumption flexibility challenges is “if you give employees an inch, they will take a mile.” But as FWI data reveal, the opposite is more likely to be true: if you give employees an inch (or more flexibility), they are more likely to go that extra mile for their employers.

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## A2

# New Realities Driving Workflex

When we think of our nation's talent strategies, we see something akin to a “new normal.” Just as the recent recession left a lasting impact on our economic operations, so too are outside pressures influencing modern work. Today's workforce policies are influenced by changing family dynamics, population growth, environmental concerns, global pandemics, technology and more.

## Uncle Sam Wants You ... to Telecommute

In December 2010, the President signed the Telework Enhancement Act that set minimum standards for teleworking among federal employees. The move is expected to improve productivity and retention, and help the government remain operational during extreme weather and crisis situations. (The “snowmageddon” of 2010 and the [estimated \\$70 million per day](#) in lost government productivity did much to help the matter along.)

In other disasters, the H1N1 virus of 2011 furthered support for telecommuting. To limit the effect of a global pandemic, we need the mechanisms to keep our employees at home when they're sick (and keep their sick children home too). That's a lot easier to accomplish when workers can login and stay productive.

Meanwhile, our transportation infrastructure isn't keeping pace with commuting demands. Large cities and states and municipalities across the country are providing financial incentives or information for organizations to implement telecommuting and flexible scheduling as part of their alternative commuter strategies. By the same token, telework is also being seen as an emissions reductions strategy, something that may play a bottom-line role in emissions trading.

## Changing Family Dynamics

Meanwhile, we're experiencing significant societal changes and a socioeconomic imperative for flexible work. The dual-parent/one-income family model of the 50s and 60s is disappearing in our country. According to 2010 census data, fewer than one in four (23%) of children in married couples have a stay-at-home parent.

It's becoming increasingly difficult for organizations to sustain rigid mandatory overtime and just-in-time scheduling policies. We're seeing a slow, but dawning, realization among hourly-wage organizations that ongoing problems with absenteeism and call-outs may be more a reflection of unrealistic staffing policies, not an irresponsible workforce.



Speaking of changing family dynamics, the percentage that women contribute to family income has been increasing. In 2008, FWI found that women in dual-earner couples contribute 45% of family income and that 27% of women earn at least 10% more than their husbands, up from 15% in 1997. (See [Times Are Changing](#), FWI, September 2011.)

Now women are outpacing men in educational attainment too. According to the U.S. Department of Education, in the 2005-2006 academic year, women earned 58% of all bachelor degrees and 60% of all master's degrees. (See [Times Are Changing](#).) These shifts are only going to increase the need for flexible work as women continue to manage caregiving responsibilities and careers.

Meanwhile, men are spending more time in hands-on parenting and are reporting levels of work-life conflict that exceed their female counterparts, according to a 2011 Families and Work Institute Report, [The New Male Mystique](#). Several pieces of additional research support this finding that men are just now going through the “having it all” conflicts that became part of the collective female identity as early as the 1970s. So, we're seeing a stronger demand for flexibility from men too. (See also [The New Dad: Caring, Conflicted and Committed](#); Center for Work and Family at Boston College, 2011. And [Global Study of Men and Work-Life Integration](#), WFD Consulting and AWLP, February 2011.)

## **Boomers and Computers**

On the topic of caregiving responsibilities, our aging population is going to place increasing demands on the sandwich generation workforce. Flex is an issue for adult caregivers, and it's an issue for healthy boomers most of whom want “retirement jobs” and want to phase into retirement when they actually do stop working. (See [Working In Retirement](#), FWI and Boston College, July 2010.)

Finally, technology means that telecommuting and virtual teams have really become part of the American work world already—flexible work policies or not. (See [2012 National Study of Employers](#), FWI.)

Office employees are already logging in at night and on weekends. It's just a matter of time before more organizations realize that expecting home-based weekend work without allowing some home-based weekday work just isn't going to fly.

Because—recession or not—the U.S. still has a skilled worker shortage. And as the economy picks up and the boomers eventually do retire, it's only going to get a whole lot worse. Organizations that get ahead and build real cultures of workplace flexibility are going to have the talent advantage and the competitive edge.

Flex is no longer an “employee accommodation.” Those days are gone. Today it is an all-around public issue and bottom-line business strategy.



# B

## Appendix B: Laws and Eligibility

In certain situations, your employer may be required to provide unpaid temporary leave or certain work accommodations. Here we provide a brief overview of a few key employment and labor laws that may impact your workflex request. Please keep in mind that many states have enacted laws in this area as well, so be sure to check with legal counsel for additional guidance.

### Employment and Labor Laws

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B1

#### **Americans with Disabilities Act (ADA)**

The basic premise of the federal ADA is to protect qualified individuals with disabilities from discrimination. Under ADA, employers are also required to make reasonable accommodations to disabled individuals unless the employer can demonstrate that doing so would create an undue hardship on the employer's operations. Per ADA guidelines, reasonable accommodations may include job restructuring, part-time or modified work schedules.

Truly identifying what constitutes a "reasonable accommodation" in any given situation requires that human resource professionals (or whomever handles human resource issues) conduct a case-by-case analysis of the circumstances of the particular situation at issue. That said, the requirements contained within Equal Employment Opportunity Commission (EEOC) regulations and Enforcement Guidance can also be applied more broadly by employers who are looking to create employee-friendly, flexible environments for all employees (not just disabled employees). One such example is the EEOC fact sheet on telework available at [www.eeoc.gov/facts/telework.html](http://www.eeoc.gov/facts/telework.html).

## Family and Medical Leave Act (FMLA)

FMLA is a federal law designed to help employees manage their work and family responsibilities by allowing them to take reasonable unpaid leave for certain family and medical reasons.

“Eligible” employees of “covered employers” may take up to 12 workweeks of leave in a 12-month period for the following reasons:

- to give birth and to care for a newborn;
- to care for an adopted or foster child, following the child’s placement with the employee;
- to care for a family member with a serious health condition;
- to care for an employee’s own serious health condition that makes him or her unable to perform the functions of his or her job; and
- to respond to a “qualifying exigency” arising when the employee’s spouse, child or parent is a covered member of the military on active duty (or has been notified of an impending call or order to active duty) in support of a contingency operation.

Further, “eligible” employees may take up to 26 workweeks of leave in a “single 12-month period” to care for a covered service member with a serious injury or illness.

Employees who take leave are entitled to maintain their health benefits while they are on leave, and most employees are entitled to return to the same or equivalent position at the end of the leave.

Generally, an employer is a “covered” employer for FMLA purposes if it employs 50 or more employees within a 75 mile radius for at least 20 workweeks each year.

To be “eligible” to take advantage of the FMLA’s provisions, an employee must:

- 1) have been employed for that employer for 12 months or longer;
- 2) have worked 1,250 hours during the 12-month period immediately preceding the leave; and
- 3) be employed at a worksite with 50 or more employees employed by that “covered employer” within a 75-mile radius of the worksite.

FMLA also includes intermittent leave (*leave of less than 12 weeks taken in separate blocks of time*) and reduced schedules (*schedule that reduces an employee’s usual number of working hours per day or week*) for FMLA needs related to serious health conditions or—if the employer agrees—for needs related to the birth, adoption or placement of a child.

## WORKFLEX STORIES

Generally speaking, under the current Fair Labor Standards Act (FLSA), private-sector employers cannot give nonexempt employees compensatory time off (“comp time”) in lieu of cash for

overtime hours worked. “Comp time” is generally reserved for public employees or exempt employees in the private-sector.

Some workplace flexibility proponents are encouraging Congress to re-work the FLSA’s comp time provisions to extend comp time to nonexempt employees in the private sector. This area is one to watch in the coming years.

The U.S. Department of Labor (DOL) has identified examples of intermittent leave/reduced leave schedule:

- An employee may take reduced leave on an occasional basis for medical appointments, or several days at a time spread over a period of six months, such as for chemotherapy.
- A pregnant employee may take leave intermittently for prenatal examinations or for her own condition, such as for periods of severe morning sickness.
- An employee who is recovering from a serious health condition and is not strong enough to work a full-time schedule may take reduced leave.

See <http://www.dol.gov/dol/topic/benefits-leave/fmla.htm>.

Finally, it is important to note that several states have enacted laws that provide different types and amounts of family and medical leave, in addition to the federal FMLA. Be sure to check the laws in your state.

### **Fair Labor Standards Act (FLSA)**

The federal FLSA sets basic minimum wage and overtime pay standards and regulates the employment of minors. Numerous states also have their own laws in this area that impose additional requirements beyond federal law.

### **Uniformed Services Employment and Reemployment Rights Act (USERRA)**

USERRA prohibits employers from discriminating against individuals because of uniformed service. It also requires employers to reemploy “any person whose absence from a position of employment is necessitated by reason of service in the uniformed services,” provided certain conditions are met.

See <http://www.dol.gov/elaws/userra.htm>.

### **Patient Protection and Affordable Care Act (PPACA)**

The federal PPACA provides, among other things, certain requirements for employers with respect to accommodating nursing mothers in the workforce. The following excerpt from the law (29 U.S.C. 207) illustrates the key requirements:

(r)(1) An employer shall provide—

(A) a reasonable break time for an employee to express breast milk for her nursing child for 1 year after the child’s birth each time such employee has need to express the milk; and

(B) a place, other than a bathroom, that is shielded from view and free from intrusion from coworkers and the public, which may be used by an employee to express breast milk.

(r)(2) An employer shall not be required to compensate an employee receiving reasonable break time under paragraph (1) for any work time spent for such purpose.

(r)(3) An employer that employs less than 50 employees shall not be subject to the requirements of this subsection, if such requirements would impose an undue hardship by causing the employer significant difficulty or expense when considered in relation to the size, financial resources, nature, or structure of the employee’s business.

Employers covered by this law must provide breaks to nursing mothers for the purpose of expressing breast milk. Employers need not compensate employees for this break time. However, while the law does not require these breaks be paid (and specifically states they can be unpaid), most employers likely already

provide their employees a few paid breaks throughout a standard shift and must allow employees to use/exhaust these paid breaks for purposes of pumping breast milk.

According to the National Conference of State Legislatures, 24 states and the District of Columbia also have enacted laws regarding breastfeeding in the workplace. For more information, see: <http://www.ncsl.org/issues-research/health/breastfeeding-state-laws.aspx>.

## OSHA

The federal Occupational Safety and Health Act (OSHA) intersects with workplace flexibility measures in two primary areas: (1) OSHA's inspection policies and procedures concerning worksites in an employee's home; and (2) recording and reporting occupational injuries and illnesses.

### Inspection Policies and Procedures

In February 2000, recognizing the increase in telecommuting and telework arrangements, OSHA issued an "instruction" to OSHA compliance staff (Directive Number CPL 2-0.125) designed to address unique issues that arise under OSHA concerning home-based worksites. The instruction sets forth OSHA's policy for home offices:

OSHA will not conduct inspections of employees' home offices.

OSHA will not hold employers liable for employees' home offices, and does not expect employers to inspect the home offices of their employees.

If OSHA receives a complaint about a home office, the complainant will be advised of OSHA's policy. If an employee makes a specific request, OSHA may informally let employers know of complaints about home office conditions, but will not follow-up with the employer or employee.

## Resources

Employment and labor law is a large complex issue. You may want to seek legal counsel before pursuing a flexibility request under one of these laws. The following resources can provide additional information:

[Center for WorkLife Law](#)

[Workflex: The Essential Guide to Effective and Flexible Workplaces](#), published by *When Work Works*

## B2

# Human Resources Implications

## Tax Deductions

If you work from home, you may be subject to certain tax advantages and disadvantages. Discuss your options with a tax specialist.

To qualify for tax deductions, teleworkers must show their work-from-home arrangement is at their employer's convenience (such as to save real estate costs or for a sales rep with a wide territory) not a personal convenience (such as avoiding a long commute).

- **Home Office** Teleworkers may be able to deduct a certain portion of their home expenses (utilities, rent or mortgage interest). To qualify, your home office must be a separate space that's used exclusively for work.
- **Office Expenses** You may be able to deduct a portion of your expenses for office supplies, Internet service and furniture.
- **Transportation Expenses** If your home office is your principle place of business, you may be able to deduct occasional travel expenses to your employer's offices or other work locations.

## **Interstate Telecommuting**

Under a rule called “convenience of the employer,” cross-state telecommuters may be taxed by both their home state and by their employer’s state. Here’s how the rule was explained in a *New York Times* piece: *The convenience rule holds that if an employee of a New York company works outside the state as a job requirement, he is subject to income tax for only those days that he works in New York. But if the same worker chooses to work outside New York for his own convenience, he is subject to income tax on his entire income. An exception is made if the worker never visits New York during the tax year.*

– excerpted from [Telecommuters Cry ‘Ouch’](#), David S. Joachim, February 20, 2008

Talk with a tax specialist to find out if your state imposes this rule (New York, Georgia and Delaware do) and whether your state provides credit for the taxes you pay elsewhere.

The Telecommuter Tax Fairness Act (HR 260) was designed to abolish this penalty. Reintroduced in fall 2011, the bill was still pending in Congress when this toolkit was published.

## **Reduced-Time Arrangements**

Unless you are reducing your hours, there is no reason to suggest (or accept) a pay cut as part of your flexible work proposal. If your full-time work status remains unchanged, your productivity should also remain the same. As long as you are doing the same amount of work, your compensation and benefits coverage will remain unaffected.

Working a reduced schedule, however, will likely affect your pay. (Even if your “reduced” schedule is still full time, if it’s less than the norm in your office, expect that to be reflected in your compensation.) Find out if reducing your hours will affect your benefits. Cutting your hours may impact your eligibility for health care coverage and retirement plan participation, as well.