

SHRM Foundation's
Effective Practice Guidelines Series

Leveraging Workplace Flexibility for Engagement and Productivity

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Leveraging Workplace Flexibility for Engagement and Productivity

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FOREWORD



Workplace flexibility is a mutually beneficial arrangement between employees and employers in which both parties agree on when, where and how work gets done. At present, the availability of well-thought-out policies in this area is uneven. *The Evolution of Work and the Worker*, a recent report published by the SHRM Foundation and written by the Economist Intelligence Unit, describes how the nature of work continues to evolve due to changing workforce demographics and the globalization of business. Accordingly, offering flexible work arrangements will be increasingly important to attract and engage a global and demographically diverse workforce.

Studies show that in the United States, telecommuting increased 80 percent from 2005 to 2012. And a 2012 poll by global research company Ipsos found that one out of five employees (17 percent) globally who could be connected online to their workplace reported that they telecommute on a “frequent basis.” India reported the highest proportion of teleworkers, at 56 percent. Workplace flexibility is truly a growing global practice.

Unfortunately, many organizations still face challenges in implementing workplace flexibility due to the perception that it is primarily an employee benefit. In fact, as this report will show, workplace flexibility is also a management tool to enhance productivity. When implemented correctly, both employees’ needs for work/life support and a firm’s needs for efficiency and productivity can be met.

This is the 18th report in the SHRM Foundation’s Effective Practice Guidelines series. Created in 2004 for busy HR professionals, the series integrates research findings with expert opinion on how to conduct effective HR practice. It provides the tools to successfully practice evidence-based management. Each report also includes a “Suggested Readings” section as a convenient reference tool. Other recent reports include *Shaping an Ethical Workplace Culture*, *Promoting Employee Well-Being* and *Building a High-Performance Culture*. To ensure the material is both research-based and practical, the reports are written by subject-matter experts and then peer-reviewed by both academics and HR professionals.

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The whole topic [workplace flexibility] has a lot to do with productivity. The more flexible we make the work environment, the more we can provide workers with what they need to manage their lives and their jobs. We end up with higher productivity. It is great for the economy and the companies.¹

– Brenda Barnes, CEO, Sara Lee Corporation

LEVERAGING WORKPLACE FLEXIBILITY FOR ENGAGEMENT AND PRODUCTIVITY



Workplace flexibility has advantages for both employers and employees. In a recent Society for Human Resource Management (SHRM) survey, 91 percent of HR professionals agreed that flexible work arrangements positively influence employee engagement, job satisfaction and retention. Yet some U.S. employers have been slow to implement flexibility policies. While progressive employers are recognized on *Working Mother* and *Fortune* magazine's Best Companies lists for their flexible workplaces, the availability of well-thought-out policies continues to be uneven across industries, occupations and employers.²

One challenge HR professionals face in implementing these policies is the belief that workplace flexibility is primarily an employee benefit, not a management tool to enhance productivity. In fact, workplace flexibility works best when implemented to address both employees' needs for work/life support and a firm's needs for efficiency and productivity. This report will address *both* sides of that equation.³

For organizations that may be hesitant to try flexible work arrangements, this report presents research showing how flexibility increases productivity. For those seeking guidance in how to implement more workplace flexibility, this publication provides an overview of options to try, along with tips and practical strategies for successful implementation. It will also examine the benefits, metrics and links to business outcomes, as well as define the roles and responsibilities of HR, supervisors and employees in the process.

The focus here is on U.S. workplaces, which are more likely to implement employer-driven flexibility policies. In other industrialized countries, there are more public flexibility supports, such as mandated paid parental leave and the statutory right to request a flexible schedule.⁴

Defining Workplace Flexibility

Workplace flexibility is a mutually beneficial arrangement between employees and employers in which both parties agree on **when, where** and **how** the employee will work to meet the organization's needs. Flexibility can be formal and officially approved through HR policies, or informal and available on a discretionary basis. It may include:

- Policies and practices governing the time, scheduling and location of employees' work.
- Alternative work arrangements and HR policies such as flextime, telework, leaves and part-time work that an entire work unit or a subgroup of employees uses.
- Changes to job design and job autonomy that permit employees more control of when and where they work.
- Informal practices such as occasionally or regularly using flextime to come in late or leave early or to work from home with supervisor permission.
- Mobile work, such as working at a client's workplace.
- Using technology to communicate and work outside the confines of the primary worksite.

The changing nature of work and the workforce is driving the need for more innovative and effective work arrangements in all sectors of the economy. Organizations that want to attract and retain high-performing employees understand the benefits of using workplace flexibility to increase employee efficiency and productivity.

Recent national surveys show that three-fourths of U.S. employers allow some employees to adjust the times they start or stop work, and almost two-thirds allow some employees to work from home occasionally. Studies also show that employees of all ages, family backgrounds and jobs value work/life flexibility.⁶ It is soon expected to become the "new normal" for conducting business.

More executives and managers recognize that workplace flexibility is critical for managing talent, maximizing productivity and achieving strategic goals. The latest research shows that many employers use workplace flexibility as a means of improving the bottom line as well as supporting employees' efforts to manage their work and family demands. Experts

predict that workplace flexibility is likely to become a competitive business practice.⁷

THE BUSINESS CASE FOR FLEXIBILITY

Research and practical experience suggest there are many benefits to workplace flexibility for organizations. Some benefits, such as employee attraction and retention, are applicable to all types of flexibility, whereas others are unique to a specific type. For example, telecommuting helps employers save on real estate expenses.⁸

Workplace flexibility may support long-term strategic business objectives,

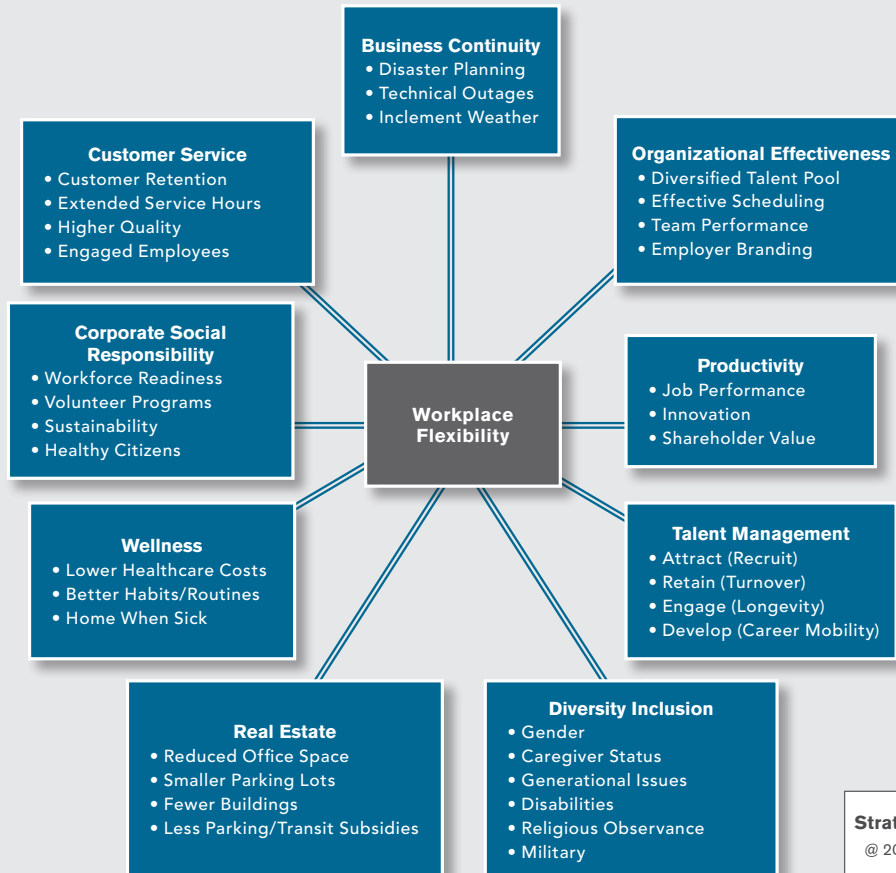
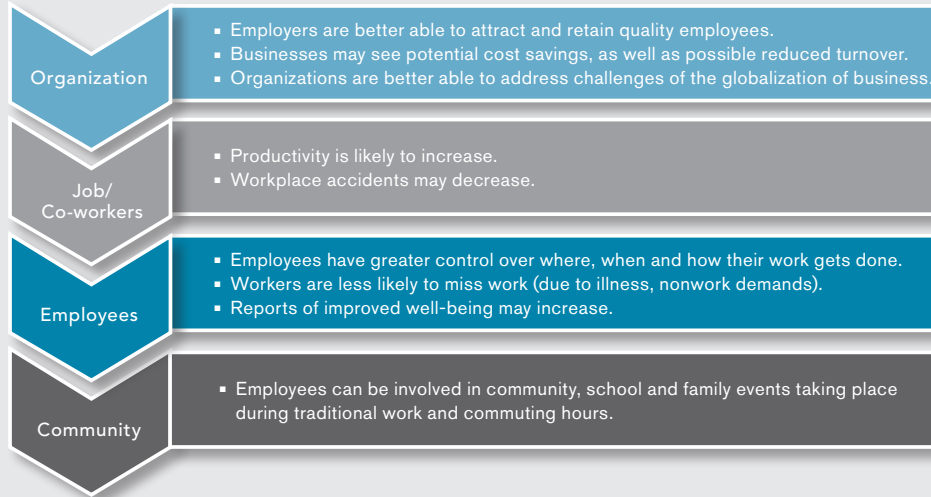
including cost savings resulting from reductions in turnover, absenteeism and workplace accidents. Some forms of flexibility, such as telework, enable work to continue uninterrupted during times of bad weather, flu season or other disruptions.

Flexibility has been linked to positive employee outcomes such as decreased stress and improved health and well-being, which have corresponding impacts on rates of absenteeism and overall health care costs. Often employees who have the opportunity to make use of workplace flexibility show increased commitment and engagement and improved

NSF's Career-Life Balance Initiative

As part of an initiative to support high-level science, technology, engineering and math (STEM) workers at universities, the National Science Foundation (NSF) recently began a 10-year Career-Life Balance Initiative. The goal is to expand family-friendly, flexible work practices for scientists nationwide to attract, retain and advance the best researchers in STEM fields. At the launch event at the White House in September 2011, participant Gina Schmalzle said, "There were representatives there from industry, academia, and government all echoing the same message, that these policies are good for everyone and they're especially good for our economy in a time when we can't afford to miss out on the talent of women or of anybody."⁵

Benefits of Workplace Flexibility



Strategic Flexibility Map
 @ 2011 Life Meets Work Inc.

performance—outcomes that ultimately help their employers.⁹

In addition to these clear benefits to employers, this report suggests that there is also a business case for workplace flexibility in improving the community by enabling employees to participate more freely in volunteer activities and engage more with family and friends. Workplace flexibility helps develop future generations of employees by providing current workers with more control as they seek to meet the demands of work and family life. The figures on previous page provide an overview of the benefits of workplace flexibility and its potential for enhancing business and strategic outcomes.¹⁰

Benefits of Workplace Flexibility for Organizations

Flexible work options are more likely to be successful when an organization encourages managers and employees to view flexibility as a **mutually beneficial business process** for determining the best approach to how, where and when work is done. When workplace flexibility is implemented well, both employees and employers benefit, as productivity is maintained and employees are able to manage work and nonwork demands more easily.

Job satisfaction

Often, more flexibility leads to higher employee job satisfaction, reduced turnover and other long-term benefits. In many cases, flexibility can be used as a strategic business tool to maintain a productive workforce.¹¹

Expanding availability to clients

Flexibility can be used to strategically expand availability to clients by allowing

employees to work nontraditional hours. But it is critical that employees not feel stressed or burned out because they perceive that flexibility means they are working all the time.¹²

Attraction and retention

Research shows that flexibility initiatives are a significant predictor of applicant attraction and talent retention. In a competitive market, an organization offering workplace flexibility can brand and distinguish itself as an “employer of choice.” Employers offering the option to work at a distance from the primary office location can fill positions with the most qualified candidates, regardless of location. A full-time employee needing to reduce his or her hours could opt to stay with the employer if the possibility of working part time or job-sharing were made available. Or an employee whose spouse is offered a position in another state may agree to continue working for his or her current employer if that employer allows the employee to work from a distance.¹³

Employee loyalty, engagement and improved performance

Offering flexible work options allows employees to have some control over where and when work gets done and to make decisions based on how they will work most productively. Employees may feel more loyal to an employer that offers them a chance to better manage their work and personal lives; this is

known in the research literature as a “positive social exchange relationship.” Such exchanges enable productivity to increase if employees feel more engaged at work.¹⁴

Reduced negative outcomes

Flexibility tends to reduce negative outcomes, such as:

- Missed work due to illness.
- Distractions due to nonwork demands.
- Occurrence of accidents.
- Unnecessary turnover from employees who cannot meet nonwork obligations.¹⁵

Cost savings and return on investment

Some flexible work arrangements may result in cost savings to employers. For example, if employees are working at a distance full time, real estate and utilities costs decline because less office space is needed. The ability to retain quality employees by offering workplace flexibility saves money otherwise spent to recruit, hire and train replacements. Decreased stress and improved health lead to less absenteeism, fewer accidents, and decreased workers’ compensation and health care costs.

Increased customer service availability

Employees who work alternative hours or work from home have

Deloitte has quantified flexibility’s cost savings by calculating the turnover expense for those professionals who said they would have left the firm had they not had a flexible arrangement. Based on this calculation, the firm determined that it saved an estimated \$41.5 million in turnover-related costs in 2003 alone.

Source: Corporate Voices for Working Families and WFD Consulting. (2011). *Business impacts of flexibility: An imperative for expansion*. Washington, DC: Corporate Voices for Working Families.

Corporate Voices and WFD Consulting's in-depth study of five organizations that implemented flexibility for their hourly and nonexempt workers showed that employee commitment was 55 percent higher for employees who have the flexibility they need, compared to those who do not. The study also found that stress and burnout are 57 percent lower when employees have flexibility.

Source: Corporate Voices for Working Families and WFD Consulting. (2009). *Innovative workplace flexibility options for hourly workers*. Washington, DC: Corporate Voices for Working Families.

access to their home offices during nontraditional work hours and are available to customers for a broader range of hours each day. These employees can mix and match their hours, so they will be available when the organization actually needs them most. This flexibility is helpful to firms that provide services to customers in different time zones or customers that may need support during nontraditional hours.

In this scenario, however, there is always a risk of work time creeping into personal time. Employees and managers should watch for “work creep” to avoid stress and burnout. Setting formal boundaries so that there is a clear distinction between working hours and nonworking hours is important.

Increased ability to meet the demands of globalization

The globalization of business also requires employees to be accessible outside traditional work hours. Conference calls often take place across time zones, early in the morning or late at night. Rather than participating in these early morning or late night calls from the primary worksite, many employees prefer to be at home. This type of flexibility meets business needs and takes into consideration employees' personal responsibilities. Businesses can support this type of flexibility by providing access to necessary documents through a secure connection from offsite locations and access to call-in numbers and webinar technology that can be used from any location.

AstraZeneca conducted a flexibility survey of the company's Delaware-based headquarters and R&D employees; 96 percent of respondents said that flexibility influenced their decision to stay at the company, 73 percent said that flexibility was “very important” in that decision, and an additional 23 percent said that it was “somewhat important.”

Source: Corporate Voices for Working Families and WFD Consulting. (2011). *Business impacts of flexibility: An imperative for expansion*. Washington, DC: Corporate Voices for Working Families.

Benefits of Workplace Flexibility for Employees

Improved work/life fit

Workplace flexibility can be a strong motivator for employees. They are more likely to join and stay with an employer because flexibility makes it easier to manage their personal life and meet job requirements. Workplace flexibility can reduce work/family conflict and increase work/life fit. Some of the positive outcomes include:

- Improved well-being.
- Better health.
- Increased job satisfaction.
- Improved objective performance.
- Lower stress.
- Reduced turnover intentions.
- Lower work interference with family.
- Reduced absenteeism.¹⁶

Less time commuting

Employees who work from home or flex their hours may reduce their commuting time, save money on related expenses and also avoid the stresses of commuting. One can make the case that employees who do not commute can work during the time formerly devoted to commuting, but this should not be a mandated component of a flexible work arrangement.

Less time commuting will also benefit the environment by putting fewer cars on the road, and benefit employees by inflicting less wear and tear on vehicles.

The time saved by not commuting may certainly be devoted to nonwork activities that would otherwise be more difficult to complete. Workplace flexibility offers opportunities for employees to be involved in community, school and family events that take place during traditional working or commuting time.¹⁷

CASE STUDY

The WorkSmart Initiative: Implementing Workplace Flexibility as a Win-Win Business Strategy

Northern Trust is a large global bank with locations spanning the globe from Chicago to London to Singapore. Rising real estate costs, office space expansion in urban locations, and the need to work across many global time zones, expand office space, and manage employees' growing commutes and requests for flexible working led the company to pilot the WorkSmart initiative. After conducting risk assessments and ensuring work processes could be replicated just as effectively at home as at the office, the program began with 33 Chicago-area employees in one work unit. For this group of employees the program was an across-the-board, team-level, mandated change.

Unlike some telework programs that may be initiated by a single employee request or one manager's flexible style, under WorkSmart whole workgroups undergo risk analysis of business process replication before migrating to the new environment. The evaluation includes examination of the feasibility of jobs being performed as well at home as in the office. This approach to flexibility is becoming the norm in the financial services industry.

Our company for some time has offered alternative work options such as flexible hours, home working and job sharing, supported by established HR policies. Most recently, we began trialing the WorkSmart initiative, which recognizes the changing nature of work and the workplace. Employers are now looking to attract and retain talent from multiple generations: Baby Boomers, Generation X, and Millennials. Our WorkSmart program is an answer to the new work demands of collaboration and mobility, providing tools and workspace to support these relatively modern trends. The initiative allows partners the flexibility to work where they are most productive rather than necessarily tying them to a traditional office cube.

– Martin Clarke, Global Head, Corporate Services Group, Northern Trust

Kristen Keniry, a VP and workplace and technology strategist at Northern Trust, explains:

WorkSmart is a formal approach to flexible work that supports the strategy and benefits of decentralization, business continuity, alternative workplaces, management by results and evolving workplace technology. WorkSmart enables improved work/life balance, increased productivity and reduced long-term operating expenses. WorkSmart is not a 100 percent work-at-home program. It emphasizes output-based management over face time.

Having worked with many groups in the industry and a number of employers, Keniry notes that sometimes there is initial resistance by managers and employees that resembles a "J curve." Initial decrease in enthusiasm or business outcomes occurs before improvement. She adds:

Moving to flexible working is *change management*. When you change the way people work, you are changing the space they work in, the way they see each other, and when they work. We are now working with a different world. We have partners and clients in other parts of the country or world, and we are constantly managing across time zones. We are integrating

Under a 90-day performance-monitoring period, **Northern Trust** financial services company conducted seven surveys every two weeks to effectively assess the WorkSmart migration experiences. Some sample statements used to survey employees are:

- The client experience is not affected by my schedule.
- My personal productivity is not impacted by the location in which I work.
- I received information and communication to do my job effectively.
- The technology I need and use is adequate to do my job.

Source: Kristen T Keniry, Vice President, Workplace & Technology Strategist, Northern Trust

I truly appreciate having the ability to work from home and the flexibility to change the days each week in order to meet the demands of work and family life. I am better able to focus on work and be a better employee when my mind is not distracted by competing needs. Through the use of instant messaging, email, and online presentation tools, I am able to interact with both staff and clients alike from virtually anywhere. This program, among many others, has enabled me to stay at Northern Trust for 19 years, through many life stages. It has been mutually beneficial.

– Jennifer Gaertner, Manager,
Investment Compliance, Northern Trust

technology strategy with real estate, customer, and employee strategies. *It is a multi-faceted win-win.*

Under WorkSmart, teams agree that individuals will have the discretion to work where they are the most productive. Managers and teams develop a charter to set protocols. The only requirement is that individuals on each team must agree to work at least one day in the office and one day at home on a regular basis each week. No one worker becomes isolated by being at home 100 percent of the time, and no one has to be in the office five days a week.

The organization gives each employee a laptop computer with an integrated “soft phone.” This allows the laptop to be used for voice communication, reducing cellphone costs.

WorkSmart was so successful that Northern Trust is now expanding it to other workgroups in the United States and abroad.

Here is a sample of the guiding principles used in the manager and team charters.

The Rules of Working Smart

Managers will create a Charter to specify requirements and communication protocols beyond those outlined in the program. The Charter will govern how the team will work in the WorkSmart program.

Team Chapters should cover the following topics:

- Communication protocols, such as:
 - Use of Lync when not in the office to enable instant communication.
 - How to denote today’s location.
 - Information security.
- Manager interaction/communication preferences, such as:
 - When to be in the office and times to be available and online.
 - Which meetings should teams attend in person?
 - Is on-site coverage necessary on certain days?
 - Is there a limit to the number of days teams may work remotely?
- Expectations:
 - If the help desk cannot resolve technical issues in a timely manner, workers need to come into the office.
 - If a worker decides to discontinue participation in the program, it may take some time to secure a dedicated workspace on site. An interim solution will be provided, as needed.
 - Emphasis will be on output-based management instead of time-based management, or management by sight.

Source: Kristen T. Keniry, Vice President, Workplace & Technology Strategist, Northern Trust

MAKING WORKPLACE FLEXIBILITY A REALITY: HR'S ROLE

Human resource professionals help organizations improve workforce engagement and productivity. Workplace flexibility can be an integral component of these efforts. HR support for implementation and effective use of workplace flexibility includes:

- Showing how workplace flexibility can engage and reward employees while also improving business outcomes.
- Encouraging senior management and supervisor support for workplace flexibility.
- Supporting workplace flexibility not just as a series of specific programs or policies, but also as a strategic business decision.
- Educating and training employees, teams and managers on how to implement flexible work arrangements to improve job performance.
- Conducting needs assessments to select and adapt flexibility policies that best fit workforce and business needs.

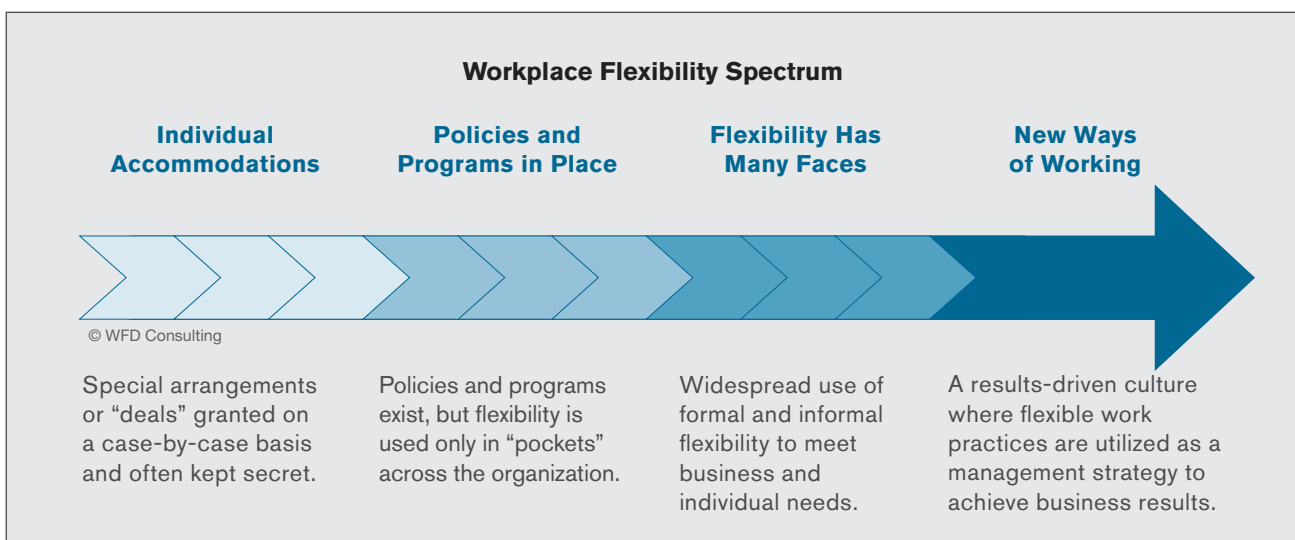
- Serving as consultants and fine-tuning policies to ensure effective implementation.
- Identifying and tracking workforce metrics related to the effective use of flexibility.
- Ensuring systematic adherence to regulations governing leaves, comp time, breaks and work scheduling across locations.
- Overseeing the pilot of a workplace flexibility initiative and then collecting feedback and modifying the initiative as needed.
- Setting a tone of positive organizational change management.

Flexibility policies are evolving in today's workplaces, and many managers and employees are experimenting with new ways of working. When implemented so that both employer and employee goals are met, workplace flexibility policies and practices can help an organization become more global, virtual and 24/7 customer-driven; increase engagement; and adapt to workforce diversity.

The Flexibility Spectrum

The meaning of workplace flexibility differs from organization to organization. Before implementing or improving policies, HR professionals may want to evaluate their firm's current flexibility approach. WFD Consulting (formerly Work/Family Directions) developed a Flexibility Spectrum to allow organizations to evaluate themselves. At one end of the continuum are organizations that view workplace flexibility as an "accommodation" for high performers or those with more acceptable or "legitimate" reasons to work flexibly. Unfortunately, if flexibility is viewed mainly as an individual accommodation, workers may be stigmatized for using it. At the other end of the spectrum are organizations that have fully integrated working flexibly into their culture, so that it has become a valued tool for achieving business objectives.¹⁸

Organizations use the Flexibility Spectrum to identify where they are and to start discussions of how they can improve and reach their goals. With training, organizations of any size can offer some variation of flexibility.



Types of Workplace Flexibility

Organizations offer several forms of flexibility, some of which, such as Family and Medical Leave Act (FMLA) leave, are legally mandated. Following is an overview of the major types of workplace flexibility and how each aligns with business needs, occupations and workforces.¹⁹

There are four primary categories of workplace flexibility:

- Time.
- Location and connectivity.
- Amount of work.
- Continuity and time off.

Flexibility in time

Flexibility in time of work allows employees some degree of choice regarding how total weekly hours are distributed to manage nonwork demands. Options include flextime, compressed workweeks, flexible shifts, part-year and seasonal schedules, and flexible breaks during the workday.

Flextime

An employee with a flextime schedule has alternative start and end times, but total weekly or daily hours worked are the same as those for other regular full-time employees. Flextime schedules can be set up formally for a workgroup or unit or established informally with supervisor discretion.

The most common flextime arrangement is one in which employees are able to choose the times they arrive at and leave the central worksite as long as they are onsite for a core band of hours, such as 10 a.m. to 3 p.m.²⁰ Some arrangements allow employees to “bank time” or vary the length of workdays to reserve future time off.²¹

Tips for HR

When an employee or manager adopts a flextime schedule, be sure to provide support regarding:

- ✓ How department or office coverage will be maintained.
- ✓ How effective channels of communication will be established and maintained.
- ✓ How work hours will be tracked.
- ✓ How performance will be measured.
- ✓ How tasks will be specified during times when a supervisor or manager is absent.

Compressed workweeks

Compressed workweeks compress full-time job responsibilities into fewer than five days per week or fewer than 10 days in two weeks. For example, over the course of a two-week period, an employee might work an extra hour per day Monday through Friday of one week and an extra hour per day Monday through Thursday of a second week to have every other Friday off. This is often referred to as a 9/80 schedule.²²

A compressed workweek should not negatively affect business, and schedules should be coordinated among employees. In some cases, whole teams may agree on a compressed workweek during slower business seasons. If an entire organization or all employees in one location take the same day off, there may be cost savings for the firm, such as using less electricity.

Tips for HR

When an employee or team adopts a compressed workweek, be sure to provide support regarding:

- ✓ How office coverage will be maintained.

Flextime Options

- An employee works 40 hours per week, is present each day during core hours, but adjusts his arrival and departure times as he wishes on a daily basis.
- An exempt employee works 40 hours per week with no core hours. She may vary start/end times on a weekly or daily schedule or set a standard schedule such as 7 a.m. to 3 p.m. on Tuesday and Thursday, and 9 a.m. to 5 p.m. on Monday, Wednesday and Friday. She may work extra hours one day to make up for fewer hours worked another day or end the workweek early every Friday after participating in Thursday night meetings to better serve clients in a different time zone.

Source: Adapted from *Workplace flexibility 2010*. Washington, DC: Georgetown University Law Center.

- ✓ How schedules will be coordinated.
- ✓ How effective channels of communication will be maintained.
- ✓ How tasks to be completed during times when supervisors or managers are absent will be specified.
- ✓ How equity will be maintained by measuring work accomplished rather than hours worked to avoid conflicts.
- ✓ How performance will be evaluated.
- ✓ How negative perceptions of flexibility will be handled.

Flexible shift work

Flexible shift work involves work that is outside of standard work hours and frequently includes working at night. Several types of schedules, when implemented effectively, can keep operations going 24/7 and expand workers' availability to meet client demands and increase productivity.²³

Before moving forward with a flexible shift work plan, consider that there may be downsides in terms of employee health. Employees who work shift schedules can experience difficulty sleeping, fatigue, accidents and injuries, gastrointestinal and metabolic disorders, cardiovascular disorders, and psychological disorders.²⁴ Some initiatives have been shown to mitigate some of these negative effects, but employees are still more likely to experience long-term negative effects from this type of schedule than from other types of work schedules. Of course, flexible shift work has advantages, too. Designing shift schedules in which employees have some control can enable them to

Flexible Shift Work Options

- A husband and wife enter into an arrangement to ensure their shifts are staggered so they can meet family obligations.
- An employee enters into an arrangement ensuring that he will not have to work an evening or overnight shift.
- An employee trades a shift with a cross-trained co-worker so she can have time off.

Source: Adapted from *Workplace flexibility 2010*. Washington, DC: Georgetown University Law Center.

trade shifts or work a shared or more predictable schedule when employees need to do so.

Part-year or seasonal work schedules

In some industries and professions, busy times and slow times of the year are predictable, so it may be beneficial for both employees and organizations to maintain part-year or seasonal work schedules. In this case, flexibility occurs over the course of a year, rather than over the course of a week or a day. For example, a tax accountant will work many more hours during the busy tax season and may then be able to work fewer hours during the summer months. The firm benefits from this flexibility, and so does the employee.

Self-scheduled breaks

Nonexempt employees by definition work on an hourly basis, are eligible for overtime, and are required to take work and meal breaks in accordance with federal and state employment laws. A manager who just considers coverage needs and workflow patterns sometimes overlooks the needs and preferences of the employees when scheduling breaks.

The option of self-scheduled breaks offers more employee control as managers let teams of workers determine who will take which break time. Managers must set expectations and identify how scheduling needs should be addressed so that the same employees are not always covering the least desirable times. This option allows an employee to time his or her break to coincide with a daily phone call to an elderly relative or to address other nonwork needs.²⁵

Flexibility in location and connectivity

Flexibility in location, or "flexplace," allows employees to conduct their work

tasks away from the main worksite, communicating with the organization and clients electronically.²⁶ This can be beneficial for both employers and employees in many ways, including:

- Saving fuel and time by avoiding the commute to and from work.
- Spending less money on business attire by working in casual clothing.
- Increasing employees' availability for nonwork demands.
- Increasing employees' availability for client demands, including working at the client's location.
- Hiring and retaining quality employees who do not live near the central worksite.
- Expanding the firm's market to new areas away from the central worksite.²⁷

Many types of telework

Telework policies vary in terms of how often employees are allowed to work away from the main worksite. Some arrangements follow an as-needed schedule or allow for offsite work only a few days a month; other policies allow offsite work several days each week.

To ensure success, HR practitioners must design and assess policies carefully, understanding that there will be variation based on employee, organization and client needs.²⁸ Both employees and supervisors should clarify their expectations.

Telework arrangements can take several forms:

- Home-based telework.
- Satellite offices or neighborhood work centers, in which several employees work from a single location, away from the main worksite, that is convenient for employees and/or customers.
- Remote work, typically quite far from the main worksite.

- Hoteling, in which employers assign office space on an as-needed basis to employees who frequently work offsite.²⁹

Tips for HR

When adopting a telework arrangement for individuals or work teams, be sure to discuss and evaluate:

- ✓ How work will get done and how meetings and joint projects will be handled.
- ✓ How communication with co-workers, supervisors and managers will continue within core hours.

- ✓ How much time will be spent in the office and when.
- ✓ What equipment and technical support will be needed and who will provide it.
- ✓ How the arrangement will be supervised and evaluated in comparison with onsite workers to ensure equity.
- ✓ Which employees or teams should be available during core work hours.

Formal and informal teleworking

Telework policies may be formally established, as those discussed above, or informal. Informal teleworking can

be problematic because it often leads employees to believe there is no clear boundary between work and home, making it impossible to “turn work off.” Smartphones, laptops and other mobile devices that make employees available 24/7 add to the problem. Offering an informal telework policy that employees do not perceive as providing enough control of their schedules can do more harm than good and may not lead to the positive outcomes the organization wants.³⁰

Supplemental teleworking

Some telework policies are implemented as a way to supplement work done at the main site, rather than to offer flexibility or schedule control for employees. Supplemental teleworking can have long-term negative effects if it leads employees to put in too many hours on the job. This is of particular concern for salaried employees who are not eligible for overtime pay and may see telework as institutionalized unpaid overtime. Overworked employees are more likely to make mistakes, have negative feelings toward employers, experience high levels of stress and feel as if they can never take a weekend off or enjoy a vacation.³¹

Tips for HR

Work with employees on these questions when considering flexibility:

- ✓ Are you self-directed and comfortable working without close supervision?
- ✓ Do you manage your time well?
- ✓ Are you comfortable working alone for long periods of time?
- ✓ Can you effectively manage work interactions with co-workers, clients, supervisors and subordinates working flexibly or virtually?

Challenges of Telework

One of the primary challenges for professionals is the risk of overwork and burnout when working flexibly. One study at IBM found employees worked an extra day a week when they telecommuted. During an economic downturn, teleworkers may feel increased pressure to always be available and working.

Although organizations may appreciate additional hours worked, quality of work may suffer from overwork and role conflicts. More hours do not necessarily mean greater productivity, and turnover of talent will occur if people believe they do not have the ability to take time away from e-mail or work during personal time. Employees working remotely should develop a means to signal when they are not available. Often teleworkers list their status in an instant messaging program. And managers should be trained to monitor telework and other flexibility policies to ensure they are implemented properly.

Avoiding worker isolation, teaching managers how to manage based on results rather than on face time and developing protocols to maintain confidentiality of company information are other challenges associated with telework.

When designing and implementing telework programs, it is critical to conduct a business analysis to determine whether and how much of a job can be performed as well at home as in the office and how this will influence the success of the policy.

Sources: Kossek, E., Ruderman, M., Braddy, P., & Hannum, K. (2012). Work-nonwork boundary management profiles: A person-centered approach, *Journal of Vocational Behavior*, 81, 112-128. Kossek, E., Lautsch, B., & Eaton, S. (2006). Telecommuting, control, and boundary management: Correlates of policy use and practice, job control, and work-family effectiveness. *Journal of Vocational Behavior*, 68, 347-367. Hill, J., Hawkins, A., Ferris, M., & Weitzman, M. (2001). Finding an extra day a week: The positive influence of perceived job flexibility on work and family life balance. *Family Relations*, 50(1), 49-58.

Using flextime and flexplace together

Human resource professionals, employees and managers should recognize that many telework policies include elements of flexibility in both time and place. Although telework is typically thought of as offering flexibility over *where* employees conduct their work, many teleworkers may also have greater ability to choose *when* they conduct their work. For example, teleworkers may more easily work during evenings or weekends. Recognizing these distinctions is critical to successfully designing and implementing telework policies.

Core hours of availability should be clarified, but not allowing flextime for employees who telework may defeat some benefits of flexible working. Employees who can exercise some control over both time and place of work may be able to coordinate work and nonwork demands more efficiently. For example, an employee may conduct a business call with a client in another time zone at 7 a.m., then help his or her children prepare for school and return to work at 8:30 a.m.

Task/team-based flexibility

Task/team-based flexibility focuses less on time, place or pace of work and more on distribution among employees. Task flexibility allows employees to cross-train and shuffle responsibilities in ways that ensure that work is always being done, even though different people are doing it. Although everyone does an equal share of labor, the work can be broken down in numerous ways.

Flexibility in amount of work

Flexibility in amount of work includes part-time, transitional part-time and reduced-load work and job-sharing. Another example is seasonal and part-year work, as previously discussed.

Part-time work

Part-time work includes schedules such as regular three-day workweeks and working 20 hours per week, setting a new schedule each week.³² Part-time work conducted as an employer strategy to avoid offering health care benefits or paying for meal breaks would not be considered an example of the mutually beneficial workplace flexibility covered in this report. Part-time jobs with too few hours to qualify for certain benefits may require people to work two or more jobs to provide for themselves and their families and can be detrimental to health and economic well-being. Some employees work part time because they cannot find a full-time job and are underemployed. Others prefer a part-time workload.

Tips for HR

When an employee, manager or work unit moves to a part-time schedule, discuss these issues:

- ✓ What work will be accomplished in the employee's reduced hours.
- ✓ How the rest of the employee's work will be handled.
- ✓ How the employee's performance will be evaluated.
- ✓ The impact on the employee's future in terms of career advancement and future workload.

Transitional part-time work

Transitional part-time work is a growing trend. In some cases employees gradually return to work after a major life event such as childbirth, adoption, surgery or a family death, but eventually work full-time again. Transitional part-time work can be used to support educational advancement while maintaining a career or help retain valuable older workers at the end of a career as they phase into retirement.

Organizations may use transitional and part-time staffing to attract and retain talent, save on labor costs, and manage peaks in work demands.

One growing trend is for greater predictability in work schedules for employees whose hours can fluctuate with customer demand. Employers provide advance notice of work schedules with few major changes once assigned, thereby giving employees a greater sense of schedule control. The goal is to minimize the negative impact of schedule fluctuations.³³

Reduced-load work

Reduced-load work, defined as working less than what is expected of a standard full-time position, with commensurate reduction in pay,³⁴ is another trend in flexibility. Reduced-load work is common for many employees, including higher-level technical and professional

A Transitional Work Solution at Fidelity Investments

Fidelity Investments, a global financial services firm with more than 54,000 employees, adopted a Retirement Services Staffing Model in 2007. This transitional staffing model manages ebbs and flows in customer demands. Rather than hiring full-time employees for a call center and having them underused during slower periods, Fidelity staffs these jobs with part-time workers during peak hours. These employees are parents, students and older workers who want challenging work and part-time hours.

Source: Boston College Center for Aging. *Executive case studies*. Boston, MA.

managers, physicians, and lawyers. For many of these jobs, “full time” can be 60 or 70 hours per week. A sales professional requesting a 75 percent load would serve 15 clients instead of the normal 20 and receive only 75 percent of his or her normal salary.

Organizations see many benefits from reduced-load work, including the retention of talent, cost savings and higher productivity. Employees often come to work with more energy than full-time workers, and jobs can be customized to match their talents. The downside is the potential for employees to receive part-time pay for full-time work if workers and managers do not fully reduce hours and workloads. And sometimes employees are stigmatized and have difficulty getting back on the career track after reducing their workload.³⁵ The financial strain of salary reductions may also cause problems for employees on reduced-load tracks.

Employees with reduced workloads can still be given high-profile assignments and projects. A reduction in hours and workload does not necessarily mean the employee’s career advancement slows. One study found that reduced-load employees receive pay increases, promotions and awards because they pursue innovative ways of customizing their workloads to their talents.³⁶

Job-sharing

Job-sharing occurs when two workers share the responsibilities of a full-time job, each working on a part-time basis. One benefit of job-sharing for employers is that it can be easy to manage because a full-time position’s responsibilities are kept intact. Two half-time employees sometimes bring more energy and synergistic talents than one full-time worker doing

the same job. Job-sharing can be challenging, however, as workers need to carefully coordinate their tasks. If one person quits or gets promoted, finding a replacement can take time.

Tips for HR

When an employee, manager or team adopts a job-sharing arrangement, be sure to discuss these issues:

- ✓ Implications for pay and benefits.
- ✓ Division of responsibilities between partners.
- ✓ Hours of work for each partner, including possible overlap.
- ✓ How job-sharers will communicate with each other, their supervisor, co-workers and clients.
- ✓ How each partner will be evaluated, both individually and as a team.
- ✓ What happens when a job-share partner leaves.
- ✓ What happens if the trial job-share arrangement does not work.

Flexibility in work continuity and time off

Flexibility in work continuity and time off can include leaves and sabbaticals, implementation of the FMLA, vacation and sick time, comp time, and career flexibility.

Long-term breaks and sabbaticals

An employee may take an extended absence from his or her job for a variety of reasons, including military service, educational or family activities, travel, or helping with a family business. Although employers may support extended leaves so that their employees can come back refreshed and energized or with improved skills, they must be able to meet business needs during the employees’ absence.

Job-Sharing Options

- One employee works Tuesday/Thursday, and the other employee works Monday/Wednesday/Friday. Together with their manager, they determine how to allocate tasks to align with their strengths.
- Two employees split one position 60/40 and share the salary accordingly. They overlap a few hours each week to ensure coordination.
- Two workers have unrelated part-time assignments but share the same budget line.

Source: Adapted from *Workplace Flexibility 2010*. Washington, DC: Georgetown University Law Center.

Legal mandates: Family and Medical Leave Act and Americans with Disabilities Act

In the United States, employees may be entitled to some change in work schedule or other arrangement under the FMLA or Americans with Disabilities Act (ADA).

The FMLA entitles eligible employees of covered employers (usually those with 50 or more employees) to take unpaid, job-protected leave for specified family and medical reasons with a continuation of group health insurance coverage under the same terms and conditions as if the employee had not taken leave.³⁷ The FMLA also provides for leave related to certain military deployments of family members. Employees may also take up to 26 weeks of FMLA leave in a single 12-month period to care for a covered service member with a serious injury or illness.³⁸

FMLA is sometimes implemented as a form of short-term workplace flexibility. To do this, employees take FMLA leave intermittently, in separate blocks of time for a single qualifying reason (e.g., medical appointments, care for an ill dependent) or on a reduced-work schedule.³⁹

For employees with disabilities, the ADA provides workplace flexibility by requiring employers to provide reasonable accommodations that enable employees to perform their jobs. This may include a change in the work environment or in the way things are customarily done that allows an individual with a disability to enjoy equal employment opportunities.⁴⁰

Vacation time

In the United States employers are not required to offer vacation time—paid or unpaid. When workloads are demanding year-round, many employees find it difficult to schedule vacations. At least one-third of workers do not use all of their vacation time due to pressures at work and social pressure to be highly involved in their jobs.⁴¹

How employers allow use of vacation time may reflect their perspective on workplace flexibility. Allowing employees to accrue and use vacation in hourly increments permits an employee to take several hours off to go to an appointment, attend a child's sporting event or take time off for other personal reasons, without using an entire vacation day. A current trend is to offer paid time-off banks in which vacation, personal time off and sick time are integrated into one package.

Paid sick time and leaves

Some workplaces offer paid sick time as a matter of workplace policy, and

some U.S. jurisdictions have passed legislation that requires access to paid sick days for workers. Paid sick leave advocates suggest that providing paid sick time can reduce turnover, increase productivity and reduce the spread of illness in the workplace.⁴² Currently there is great variation in terms of what is offered to workers—how much sick time is available, if it covers family members or just employees and if it can be taken in hourly increments or only by the day.

Comp time (compensatory time off)

As defined by the U.S. Government Office of Personnel Management, comp time is time off with pay in lieu of overtime pay for regularly scheduled, irregular or occasional overtime work.⁴³

The government has implemented guidelines for comp time that may be approved in lieu of overtime pay for irregular or occasional overtime work for employees deemed both exempt and nonexempt under the Fair Labor Standards Act (FLSA).⁴⁴

Organizations should clarify how they will handle situations that result in overtime hours without additional financial compensation. HR, in conjunction with legal counsel, must establish guidelines that are clearly communicated to both managers and employees. The issue of how unused comp time is treated at the time of an employee's voluntary or involuntary termination should be included in the guidelines, in addition to clearly defined expectations regarding the number of extra hours an employee may be asked to work.

Career flexibility

Many careers do not involve a hierarchical progression in one organization or occupation. Increasingly,

employees leave the workforce at some point in their careers with the expectation that they will return in the future. Career flexibility is often combined with other types of flexibility. In one example, Deloitte, an international consulting firm, was experiencing high turnover of talent, especially among women who wanted some career flexibility to vary their time at work via career breaks and altering workloads, locations, scheduling and the pace of work. Deloitte implemented a program called Mass Career Customization—a successful initiative that allows employees to increase and decrease the intensity of their career trajectory at different times in their lives. The program has been rolled out to thousands of employees globally.⁴⁵

Challenges for hourly workers

Hourly employees face the same demands outside of the workplace as do salaried workers and typically have lower pay and fewer resources at their disposal. These workers tend to have more restrictions on their schedules and work locations and fewer benefits. Altering the number of hours these employees work is generally not an option because it will directly affect their income, and the types of tasks they perform do not lend themselves to typical versions of workplace flexibility. For example, a waiter cannot have flexibility over the location of his or her work. A member of a production team cannot unilaterally choose when to start or stop his or her workday because completing an assignment is determined, in part, by the team working together.

Best Advice: Focus on Results, not Face Time

Many employers use face time as a proxy for productivity. University of

Minnesota researchers examined how increasing control over work time influences worker and employer outcomes.⁴⁶ Change initiatives developed to move workgroups to a no-face-time work environment focused on results were implemented with employees in a white-collar corporate workforce. Workgroups and supervisors were trained to move away from the traditional long hours spent at work and toward an emphasis on the quality of the work accomplished; this put employees in control of the time and timing of their work.⁴⁷

Besides moving away from traditional approaches to when and where work is done, a focus on results and time use destigmatization are ways of increasing control over work time. In the University of Minnesota study, control over work hours led to greater perceptions of schedule control, less work-family conflict and fewer employees leaving the company.⁴⁸ Increasing sleep time on nights before workdays, encouraging employees to go to the doctor when they are sick and increasing exercise frequency were also found to be related to increased control over work time.⁴⁹ This study indicates many benefits associated with changing the culture to move away from face time.

SUCCESSFULLY IMPLEMENTING WORKPLACE FLEXIBILITY

This section, along with the figure on the next page, offers guidelines for successfully implementing workplace flexibility.⁵⁰ It is critical to systematically evaluate its effectiveness and fine-tune practices, similar to any other HR policy.

Defining Roles

It is important to ensure that HR professionals, employees, managers and leadership all clearly understand their roles and responsibilities in adapting and implementing flexibility in the workplace.

HR professionals' roles as change agents and facilitators

Human resource professionals play an important role in supporting the successful implementation of workplace flexibility. They should be available to educate employees and managers, answer questions, and coach as needed. In some organizations, HR is required to review and sign off on all flexible work arrangements, those approved and those denied by managers. The HR role includes ensuring some level of consistency in implementation of flexible work practices and adherence

to policies and procedures. Good oversight by HR professionals will help prevent abuse of workplace flexibility and identify cases of favoritism and inconsistencies among managers or departments.

In a successful flexible workplace, HR also has training responsibilities. Training is a key piece of implementation, especially for managers and employees who are not fully supportive of workplace flexibility. Training should address myths about workplace flexibility and allow concerns to be aired and addressed. Employees, managers and teams should understand workplace flexibility policies and expectations. Training reinforces guidelines and policies and creates positive work cultures.

Roles and responsibilities of employees

In many cases, when an organization first moves toward flexibility, the arrangement is initiated by an employee who outlines how his or her work will be accomplished. Some employers ask for formal proposals, particularly when they have not yet moved to a group-oriented flexibility culture. Proposals vary by employer; some are standard forms, whereas others are more like memos. Purdue University has a memo template that employees must

Flexibility can mean a variety of things to different associates. Having a supervisor listen, ask the right questions, and encourage associates to make good choices for their personal as well as professional life can make a big difference in associate engagement. By being flexible, Spartan is able to attract, recruit and retain top talent. This ultimately makes us a top performing organization.

– Heather Baldwin,
Director of Human Resources,
Spartan Stores



use when requesting a flexible work arrangement.⁵¹ It requires the employee to address the following:

- Description of proposed arrangement, including the current work schedule and the proposed work schedule and how the employee will fulfill job responsibilities under the proposed changes.

Example: Work 8 a.m.-6 p.m. Monday through Thursday and 9 a.m.-1 p.m. from home on Fridays (compressed workweek and telework).

- Evidence of consideration of the department's needs and job expectations.

Example: I'm responsible for data analysis, work that is performed

independently with little interaction with colleagues, so I can do my work without any problem during hours others are not in the office.

Example: Most of the meetings I participate in are on the phone, so working from home on Fridays should not be an issue.

Example: Fridays are meeting-free days in our department, so ending my workday at 1 p.m. will not interfere with department meetings.

- Identification of potential benefits of the arrangement.

Example: Because I will be working later Monday through Thursday, I will be more available to our clients in earlier time zones.

- Opportunities for improved cost-effectiveness, productivity and customer satisfaction resulting from a flexible work arrangement.

Example: I will be able to attend to some personal obligations on Friday afternoons; as a result, when I'm working, I will be able to focus on work and not try to arrange appointments for my elderly mother during my work hours.

- Description of aspects of the job that make the flexible option feasible.

Example: I accomplish almost all of my job tasks independently, and therefore, my hours do not need to match hours of my colleagues or my supervisor.

- Explanation of ways this arrangement meets the needs of the organization, supervisor, colleagues and customers.

Example: I will be as productive, if not more productive, in this arrangement because it will allow me to meet my personal obligations more easily. I will make myself available in case of emergency on Friday afternoons. If I know several weeks in advance, I can adjust my schedule so I am in the office all day on Friday if I am able to work from home until 1 p.m. on another day that week.

At Purdue, the employee is also required to address opportunities for enhanced communication and management of work and discuss ideas for measuring productivity and satisfaction with one's supervisor. The template requires that employees address how they will accommodate holidays and peak productivity time. This type of formalized arrangement is helpful when flexibility is first introduced to an organization and has not yet moved to a results-driven

work culture that accepts new ways of working.

Over the long term, employers that move toward team- and job-based flexibility cultures and results-oriented performance measurement and communication may be most likely to reap the benefits of workplace flexibility. Very formal, individual approaches to flexibility may not sustain a flexibility culture. In other words, flexibility must be flexible and viewed as one of many ways of working effectively.

Tips for HR

When an individual or department adopts a flexible work arrangement, consider these questions and issues:

- ✓ What is the new way of working being proposed, and can work requirements be met equally well under a flexible schedule as before the change?
- ✓ Are there any possible challenges of the arrangement, and how will these potential consequences be addressed?
- ✓ What are the measures of performance effectiveness and success?
- ✓ How will security and technical issues be addressed?
- ✓ Consider the effects of the flexible work arrangement on:
 - The team, co-workers and manager(s).
 - Customers or clients, both within the organization and outside.
 - Job requirements and business objectives.
 - The employee and his or her well-being.

Roles and responsibilities of managers

Managers play an important role in the successful implementation of a flexible work arrangement. They need to be familiar with the organization's policies and procedures and be culturally supportive of flexibility in the workplace. If a manager has reservations about flexible work policies, he or she should discuss them with a more senior manager or an HR professional so that employees are set up for success and have the necessary support.

When a manager and HR professional review the feasibility of implementing a flexible work arrangement or continuing one, the primary question should be whether business needs are being met. If job objectives can be met, then the flexible arrangement should be supported.

Family-supportive supervisory behaviors

Spartan Grocery Stores provides a case study of effective implementation of workplace flexibility. Using simple tools, department heads in the grocery stores were trained to apply "family-supportive supervisory behaviors" (FSSBs), including emotional support, instrumental support, role modeling behaviors and creative work-family management. Workers reported greater job satisfaction and fewer intentions to leave the job, and indicated that the increased flexibility led to greater commitment. The Spartan Grocery Stores study shows that when employees believe their managers support family needs, they have lower levels of work-family conflict and improved engagement.⁵²

Performance evaluation

Performance management issues are often magnified when flexible work arrangements are involved.

If employees have been evaluated based on results and not on face time, then where and when their work is accomplished should not be an issue. A manager's habit of "sticking her head into someone's office" may need to be modified to include communicating a last-minute issue, opportunity or question by e-mail or phone.

Communication strategies

To support effective communication and teamwork, managers should encourage new work habits for employees working flexibly. For example, employees working nontraditional hours or part time should include their hours in their e-mail signature and update their outgoing voicemail message regularly to inform others of their availability. During meetings in which some participants are in the same room and others are on the phone, it may be helpful to write names of people on the phone on a flip chart, so those in the room do not forget to ask their colleagues for input. When scheduling meetings, managers must be aware of team members' schedules to find times that work for all involved. Investing in webinar technology may contribute to more effective meetings so that everyone involved will be viewing the material simultaneously.

Sometimes a face-to-face conversation is appropriate, especially when there is a significant chance for misunderstandings, such as during discussions of emotionally charged or complex topics. For example, a performance review may be more effective in person.

Technology support

A discussion about technology should be part of evaluating and setting up a flexible work arrangement.

Coordinating technology support may pose some challenges, but taking the time to collect information about employees' needs and to identify the best ways to meet these needs will pay off in the long run. This includes discussions about phones, laptops and document security.

Roles and responsibilities of leadership and senior management

Leaders and senior managers play important roles in implementing workplace flexibility. They should model flexibility in their own work lives, either formally or informally. For example, if a senior manager and his team travel and get back late on a Thursday night, perhaps he should encourage working from home on Friday. Seeing a senior manager stay late on Monday and Tuesday, then leave early for her daughter's soccer game on Wednesday afternoon sends a message to all employees that personal and family needs are supported. However, if a senior manager leaves early, but others on his team are not permitted to do so, this may reinforce status differences, undermining efforts to create a culture supportive of informal flexibility.

How senior leaders interact with employees working flexibly sets the tone for the level of acceptance by others inside and outside the organization. Comments such as "Leaving early?" made to someone working a flextime schedule may be interpreted as criticism. Senior management can send a message of support by promoting those working flexibly. For example, some employees who job-share have been promoted as a pair.

As always, results and meeting business objectives should be the basis for evaluating employees' performance. This includes evaluating the performance of managers supervising those on flexible work arrangements. How supportive are managers? How willing are they to help employees identify the best flexible work arrangement or a combination of arrangements? How supportive are they

Using Workplace Flexibility: Tips for Managers

- Keep an open mind, experiment and evaluate how the arrangement is working; do not rush to make a yes or no decision.
- If you are uncertain about workplace flexibility or concerned about managing someone working flexibly, try to put your assumptions aside and look at the evidence.
- Be clear about the business objectives that must be met by individuals and teams.
- Do not ask why a person is seeking a flexible work arrangement; ask whether the work can be done and whether the employee will be able to be just as effective working flexibly as not.
- If the flexible work arrangement needs to be revised, identify areas that require additional information or modifications.
- Remember that you play a key role in successful implementation.
- Recognize that employees and teams may have different working styles and preferred hours.
- Trust that your team is managing its work responsibly, and empower your team to meet business objectives.
- Help your employees think about all the components of working flexibly, so they are more likely to succeed.
- Share best practices, so employees can learn from the experiences of others.
- When considering supervision of employees working different hours than you work or at a different location, think about how much of each employee's time/work you actually personally observe when he or she is in the office during traditional working hours and how much is already conducted via e-mail and other information and communications technology (ICT) options.
- When appropriate, hold meetings by phone rather than in person.
- Establish core hours for your team if everyone needs to overlap for several hours each day.
- Set reasonable deadlines, so you do not force employees to abandon their flexible arrangement.
- Schedule regular check-ins, allowing both you and the employee working flexibly to touch base and to discuss how the arrangement is going.

of their employees' lives outside of work? Are they respectful of work/life boundaries?

Workplace Flexibility Metrics and Measurement Tools

Measurement tools are essential for HR professionals to measure, assess and monitor the effectiveness of workplace flexibility programs. Before adopting policies, it is wise to do an assessment of employee needs. You may collect some metrics through written surveys, focus groups or interviews, asking managers and employees about their use of flexible work options and their experiences with colleagues working flexibly. You may make comparisons between employees who do and do not use workplace flexibility and look at employee populations for whom workplace flexibility is available, even if those employees are not using the options. Measures often include surveys with validated scales measuring employee commitment, job satisfaction, and stress and burnout.

Data regarding the availability of flexibility and its importance in employees' decisions to join and remain with an organization can be informative. Asking employees and managers about their perceptions of flexibility is also valuable. Be sure to include employees using flexible work arrangements and those not using flexibility to provide a more complete picture of the workforce. Organizations need to know if the flexibility offered gives employees the control they desire.

Analyzing specific personnel data may also provide important information regarding the business case for flexibility. Useful data might include measures of productivity, client satisfaction, absenteeism, coverage for client service, turnover and information gathered from exit interviews.

Case Study: Informal Flexibility and Co-worker Support in Portland, Oregon

The City of Portland's Water Bureau has been concerned about work/life fit and safety for its field crews for some time. Workdays typically revolve around fairly inflexible structured hours of 6:45 a.m. to 4:15 p.m. Mondays through Thursdays, and 6:45 a.m. to 3:15 p.m. on Fridays, with every other Friday off. Field crew workers have managed to gain workplace flexibility by negotiating within their teams. "When workers need to take time off for family, health, or nonwork related responsibilities, the flexibility comes within the work group," says former safety manager Eric Fullan.

There are no formal workplace flexibility policies on the books, but these workers did not report high levels of work/life conflict in a recent survey because they believe that there is extensive support within the workgroup. Workers routinely cover for one another and say they are "family." Many have worked together for more than 10 years.

However, the survey also found a fair amount of work inefficiencies that led to a National Institute for Occupational Safety and Health (NIOSH) project with Portland State University and the Oregon Healthy Workforce Center. As part of the project, WFD Consulting was hired to introduce and adapt its Team Effectiveness Process.TM The research team also introduced family-supportive and safety-supportive supervisor training to improve informal work/life fit and safety among the field workers.

WFD Consulting's Team Effectiveness Process is an example of a tool that helps teams improve innovation, flexibility, communication and effectiveness in day-to-day work. Through this process, teams identify inefficiencies and practices that contribute to low-value work, address excessive workloads and enhance work/life effectiveness. They develop practical solutions that can improve individual, team and business performance. These team discussions and resulting action plans are likely to include both formal and informal flexible work practices. They provide opportunities for the workgroup to express concerns about how work is done and what could be done differently or more efficiently.

Evaluation tools and metrics are crucial for establishing the business case for flexibility and implementing policies and practices that are rewarding for the employees as well as for the firm. Feedback from employees and customers, in addition to job performance, helps organizations improve workplace policies and practices and consider possible additional options as appropriate.

When evaluating workplace flexibility policies and practices, HR professionals should carefully consider the needs of the organization

and employees, as well as what a successful program should accomplish. Pre- and post-measures help determine if any changes in the desired outcomes occur after a new policy or program is implemented. Metrics may include:

■ A work environment assessment, measuring:

- Job stressors.
- Burnout.
- Work overload.
- Employee intentions to quit.
- Job satisfaction.
- Subjective performance (a

supervisor's perceptions of a subordinate's job performance).

- Objective performance (reliable measures of an employee's actual work outputs).
- Interest in and need for different types of workplace flexibility.

■ **Outcomes of workplace flexibility policies and practices:**

- **Policy Adoption and Perceptions of Flexibility** measures the extent to which a policy is perceived as flexible and related to family supportive behaviors.
- **Use of Workplace Flexibility:** Employees may not take advantage of policies that are offered. Measure actual use to assess needs and effectiveness. Remember that not all employees need all flex options all the time. Actual use should be compared to the pool of employees for whom policies are currently relevant. For example, paternity leave use is measured based on the number of recent

fathers, not all men or all men with children.

- **Psychological Job Control** measures personal freedom to control how, where and when one's job is conducted.
- **Family-Supportive Supervisor Behaviors (FSSB)** measure behaviors of supervisors that support families. Four categories are used: emotional support, instrumental support, role modeling behaviors and creative work-family management.
- **Work Climate for Family and Nonwork Roles** measures the extent to which an organization's climate is conducive to sharing family concerns or personal needs.⁵³

CHALLENGES OF WORKPLACE FLEXIBILITY

Workplace flexibility has many potential benefits—but also potential challenges in implementation. HR professionals will be expected to monitor these challenges and help create solutions.

Challenge: Employees and teams may adopt a flexible arrangement, but the arrangement interferes with meeting business objectives.

Recommendations: HR professionals should review the arrangement and help create clear expectations and metrics to ensure both business and personal needs are met. Manager, employee and team training should reinforce that work can be done effectively on a flexible arrangement.

Challenge: A manager's uncertainty about workplace flexibility results in his or her unit denying requests or treating employees on flexible arrangements negatively.

Recommendations: HR professionals should provide manager training, allowing managers to express concerns and collaborate on solutions, and then present the business case as part of group or one-on-one training. Piloting workplace flexibility, measuring the results and sharing success stories of business needs being met may help managers be more supportive.

Five Tips for Achieving a Better Work-Family Fit

- ✓ **Train managers and supervisors to be more supportive of work and family.** Managers and supervisors who support employees' needs attract and retain workers who report better health, improved job satisfaction and more loyalty to the company.
- ✓ **Give workers more control over their work hours.** Increased control over when, where and how work gets done correlates with improved health behaviors.
- ✓ **Create resource guides for employees and their families.** For example, create a list of day camps for children of various ages and contact information for elder care resources.
- ✓ **Be a role model.** Take some time off to exercise or be with family and friends to show employees this should be a priority.
- ✓ **Encourage and support flexible schedules.** Help employees come up with creative solutions for working flexibly.

Source: Adapted from Hammer, L. B. (2012). Employer support for work and family balance reduces safety health risks. *TWH™ in Action!*, 1(2).

Challenge: An employee may not want to request a flexible arrangement for fear of future career repercussions.

Recommendations: HR professionals can influence how workplace flexibility is perceived, reinforcing flexibility as a business tool. As workplace flexibility becomes more integrated in the organization, fear should subside. Share stories of employees on flexible arrangements being promoted to allay some of the fears, or share examples of how flexibility can help productivity.

Challenge: A manager may assume that someone on a flexible work arrangement would not be interested in a different job opportunity or promotion that did not have flexibility, so the manager does not consider the employee on a flexible arrangement for new opportunities.

Recommendations: Flexible work arrangements provide opportunities for HR to reinforce with supervisors the importance of managing performance based on results, not face time. Manager training should include reminders of the need to consider employees on flexible arrangements for promotions. It is always better to ask the employee than to assume the answer.

Challenge: An employee thinks he or she can use a telework arrangement in lieu of securing child or elder care.

Recommendations: An organization's workplace flexibility policy should include a statement clearly establishing that flexibility is not a substitute for regular dependent care if it interferes with an employee's or team's ability to do the job. A discussion should take place if an employee is not as productive when working from home.

Challenge: Co-workers resent an employee's flexible work arrangement and therefore subtly do or say things to undermine its success.

Recommendations: HR training must include not only employees who are using flexible work arrangements, but also their co-workers so that everyone has a common understanding of expectations. Managers and HR professionals should work with teams to come to a consensus regarding expectations. If a flexible arrangement is working and the employee and teams are productive, co-workers' resentment should subside. If workplace flexibility is available to everyone, rather than only to a few favored employees, there is less reason to be resentful.

Potential Negative Outcomes of Flexibility

In addition to all the positive outcomes discussed above, there are potentially negative outcomes associated with workplace flexibility if employees or employers abuse the policies. Organizations must assess the effectiveness of policies and practices and develop strategies for overcoming obstacles across different workgroups.

Potential negative outcomes that could create barriers to successful implementation include:

- **Stratified workforce schedules of “haves and have-nots.”** In many cases there are discrepancies in access to and use of workplace flexibility policies between exempt salaried employees and lower-wage hourly employees. In some situations, managers use flexibility as a way of manipulating an hourly employee's work schedule to meet management's needs for flexible scheduling. For example, one management practice used to avoid overtime and paying employee benefits is to use part-time workers to fill shifts during high-demand hours. Managers may also use flexibility to piece together coverage, manipulating employees'

What prevents employees from using workplace flexibility policies and keeps organizations from realizing the full benefits of flexibility?

- Face-time culture.
- Excessive workloads.
- Manager uncertainty.
- Customer demands.
- Fear of negative consequences.

Source: Adapted from Corporate Voices for Working Families and WFD Consulting. (2011). *Impacts of flexibility: An imperative for expansion*. Washington, DC: Corporate Voices for Working Families.

schedules without consideration of their needs. This is particularly detrimental to working parents who need consistent schedules to make adequate arrangements for child care. Some labor unions are skeptical of words like “flexibility” because they are concerned about these potential downsides.


- **Work intensification.** Sometimes an employee is working part time and being paid for part-time work, but is expected to complete close to a full-time workload. Such work intensification is seen frequently in professional reduced-load jobs.
- **Favoritism.** Sometimes managers limit access to workplace flexibility to the strongest performers (“superstars”). Some managers use control of schedules to punish employees.
- **Lack of integration.** Employees working flexibly may not be integrated well with the team or with the organization’s workflow.
- **Limited technology and resources.** Some firms lack the resources, such as communications tools or scheduling software, needed to support flexibility in a global workforce facing cultural, legal and formal barriers to workplace flexibility. Collaboration and strong communication are especially key when a team is working from different locations.
- **Increased health risks or accidents.** Certain forms of flexibility, such as compressed workweek schedules, are associated with health risks. Increases in number of hours worked per day may lead to more physical strains and burnout.

CONCLUSION: MAINSTREAMING FLEXIBILITY

In recent decades, organizational norms and values have shifted toward increased flexibility in time, place and the ways that work gets done, leading to many innovative strategies. These changes have led to increased productivity and effectiveness for both employees and employers. The goal of this report is to help organizations better understand workplace flexibility and to support moving flexibility from the “organizational margins to the mainstream.”⁵⁴

Workplace flexibility is increasingly being seen as an integral part of a new results-driven culture. Continued analysis is needed to learn more about the specific ways workplace flexibility can support organizational effectiveness. Regardless of how flexibility is implemented in an organization or industry, over the long run, most leading organizations are expected to create policies that reflect the shift of workplace flexibility into the mainstream.

Therefore, organizations that do not explore options for flexible work may fall behind and find it more difficult to attract and retain the best employees. Providing more workplace flexibility can help you create a supportive work environment in which both employers and employees will thrive.



Evaluation tools and metrics are crucial for establishing the business case for flexibility and for implementing policies and practices rewarding to both the employees and the firm.

APPENDIX A: OVERVIEW OF BENEFITS AND CHALLENGES OF WORKPLACE FLEXIBILITY⁵⁵



Types of Flexibility	Types of Policies/ Practices	Benefits		Challenges	
		Employee	Organization	Employee	Organization
Time Schedules	Flextime	<ul style="list-style-type: none"> Available for nonwork demands during regular work hours Greater perceptions of control 	<ul style="list-style-type: none"> Reduction of overtime Lower absenteeism 	<ul style="list-style-type: none"> May not meet all nonwork demands (100% flexibility) 	<ul style="list-style-type: none"> Coordinating employee schedules Clients' needs Implementation costs
	Compressed workweeks	<ul style="list-style-type: none"> More days "off" per period Time for meeting nonwork demands 	<ul style="list-style-type: none"> Lower overhead costs 	<ul style="list-style-type: none"> Not always "flexible" (degree of choice in day off) Longer workdays can lead to burnout 	<ul style="list-style-type: none"> Coordinating employee schedules Clients' needs Implementation costs
	Flex shift work/ workday schedules	<ul style="list-style-type: none"> Can be available during "traditional" work hours for other nonwork demands 	<ul style="list-style-type: none"> Can expand availability to clients Can increase hours of productivity/ work 	<ul style="list-style-type: none"> Fatigue Metabolic & cardiovascular disorders Work-family conflict 	<ul style="list-style-type: none"> Accidents & injuries Difficult to fill/ schedule all shifts
	Self-scheduled breaks	<ul style="list-style-type: none"> Greater control over schedule 	<ul style="list-style-type: none"> Employees may be more productive 	<ul style="list-style-type: none"> Co-workers may want the same breaks 	<ul style="list-style-type: none"> Coverage needs must still be met
	Part year/ seasonal	<ul style="list-style-type: none"> Employees are able to work less during slower times of the year 	<ul style="list-style-type: none"> Organizations are able to hire from a larger pool of candidates 	<ul style="list-style-type: none"> Working less than a full year may result in lower compensation 	<ul style="list-style-type: none"> More paperwork because of hiring people every year or season
	Weekend/ evening/night work	<ul style="list-style-type: none"> Employees can better manage their nonwork responsibilities, or work a second job 	<ul style="list-style-type: none"> Organizations needing 24/7 coverage have a greater pool of candidates 	<ul style="list-style-type: none"> Dependent care may be more difficult to find in the evenings or nights 	<ul style="list-style-type: none"> Managers who work during the days may not be available to supervise evening or night employees

(Continued on next page)

Types of Flexibility	Types of Policies/ Practices	Benefits		Challenges	
		Employee	Organization	Employee	Organization
Place	Telework; home based	<ul style="list-style-type: none"> • Can live farther from central worksite • Reduces commute to/from work • Comfort/clothing 	<ul style="list-style-type: none"> • Less overhead costs at central worksite • Can attract/ retain employees who live away from main worksite 	<ul style="list-style-type: none"> • Communicating with colleagues/ supervisor • May not have flexibility in time • Pressure to be available during standard work hours (visibility/face time) 	<ul style="list-style-type: none"> • Facilitating communication • Not all work can be taken offsite • Typically requires providing employee with technology
	Remote work	<ul style="list-style-type: none"> • Can live great distance from central worksite 	<ul style="list-style-type: none"> • Enlarges pool of workers • Employees can be located closer to customers 	<ul style="list-style-type: none"> • Communicating with colleagues/ supervisor 	<ul style="list-style-type: none"> • Facilitating communication & long-term goals • Typically requires providing employee with technology
	Hoteling	<ul style="list-style-type: none"> • Indirectly, the real estate cost savings benefits all employees 	<ul style="list-style-type: none"> • Reduces office costs 	<ul style="list-style-type: none"> • Feelings of isolation when removed from team members 	<ul style="list-style-type: none"> • Can be difficult to coordinate teams/ foster commitment
Amount of work	Job-sharing	<ul style="list-style-type: none"> • Lower role overload • Less work-family conflict 	<ul style="list-style-type: none"> • Can retain trained/ quality employees who otherwise could not maintain workload • Reduced turnover costs 	<ul style="list-style-type: none"> • Role identification may be unclear • Each employee is dependent on the other 	<ul style="list-style-type: none"> • Increased expenses resulting from number of employees (e.g., benefits)
	Reduced load or customized work/part-time work	<ul style="list-style-type: none"> • Less work-family conflict 	<ul style="list-style-type: none"> • Can retain trained/ quality employees who otherwise could not maintain workload • Reduced turnover costs 	<ul style="list-style-type: none"> • Decrease in compensation • Need to be careful not to try to do full-time workload in fewer hours 	<ul style="list-style-type: none"> • More employees to manage and possibly higher overall benefits expenses
Continuity of work	Long-term breaks/ sabbaticals, career flexibility	<ul style="list-style-type: none"> • Less chance of burnout; opportunity to reenergize 	<ul style="list-style-type: none"> • Long-term retention of quality employees 	<ul style="list-style-type: none"> • Loss of pay for a period of time 	<ul style="list-style-type: none"> • Work must be covered while employee is on break
	FMLA	<ul style="list-style-type: none"> • Able to attend to self or family member who is ill 	<ul style="list-style-type: none"> • Retention of employees who might otherwise leave the organization 	<ul style="list-style-type: none"> • Compensation impacts 	<ul style="list-style-type: none"> • Work must be covered while employee is taking leave
	Comp time	<ul style="list-style-type: none"> • Extra time off in exchange for working extra hours when needed 	<ul style="list-style-type: none"> • No additional financial repercussions while having employees work extra hours when needed 	<ul style="list-style-type: none"> • If employee continues to be very busy, he or she may not get to use his or her comp time. 	<ul style="list-style-type: none"> • At some point, employees will use comp time and therefore not be working

APPENDIX B: PREVALENCE AND RECENT TRENDS IN WORKPLACE FLEXIBILITY



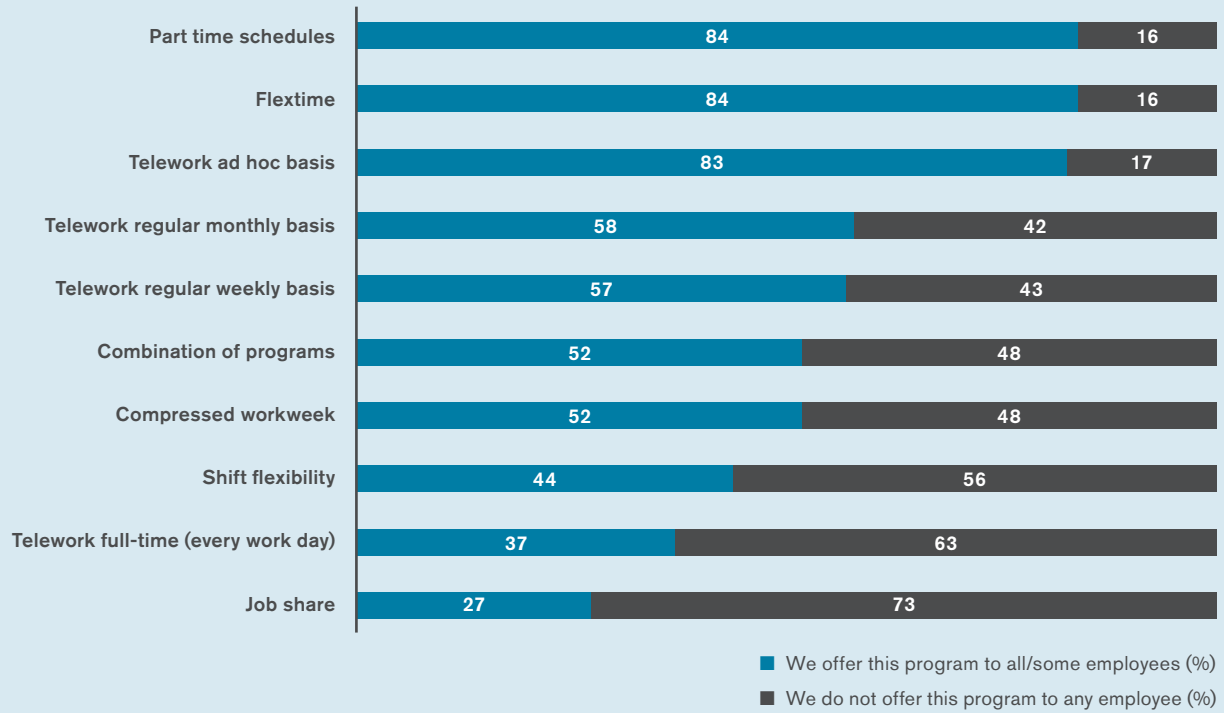
No national U.S. government survey comprehensively captures workplace flexibility, although the Bureau of Labor Statistics has a National Compensation Survey that is beginning to track access to flexplace, particularly telework. Several national surveys are available based on different samples, and each has a slightly different workplace flexibility focus, providing some helpful insights.⁵⁶

WorldatWork conducts annual surveys of respondents primarily in managerial or higher-level positions in the central location of a company across the globe. Its 2011 survey of 537 employers asked what types of flexibility arrangements are offered to all or some employees. The more commonly offered (and used) forms of workplace flexibility are part-time schedules, flextime and teleworking on an ad-hoc basis. Another notable finding of the survey was that once a firm offers one form of flexibility, it typically follows up by offering a number of other flexible arrangements (on average six). Availability varies by sector with large, private, publicly traded and nonprofit organizations offering the greatest flexibility.

WorldatWork surveys also show that men and women around the world seek workplace flexibility as a solution to managing work/life challenges in relatively equal proportions. Flexibility in beginning/ending work time was the preferred work/life solution (35 percent for women, 34 percent for men), compared with compressed workweeks (15 percent, 14 percent respectively) and telework (14 percent, 15 percent respectively)⁵⁸ More highly educated employees as well as managers/professionals typically have greater access to all types of workplace flexibility than do less educated employees, and nonmanagers.

Families and Work Institute conducted an in-depth survey of employers' workplace flexibility programs, policies and practices in 2012.⁵⁹

WorldatWork 2011 Prevalence of Flexibility Programs⁵⁷




Type of Flexibility

Type of Flexibility	Some employees are allowed to...(%)	All/most employees are allowed to...(%)
Flextime/place		
Periodically change start/quit time (within some range of hours)	77	27
Change starting/quitting times on daily basis	39	9
Compress workweek (for at least some part of year)	36	7
Work some regular paid hours at home occasionally	63	6
Work some regular paid hours at home on a regular basis	33	2
Control over time at work		
Have control over when to take breaks	93	62
Have choice/control over shifts	36	7
Reduced time/time off		
Work part year (reduced time on annual basis)	18	2
Take time off during the workday to attend to important family/personal needs without loss of pay	87	55
Caregiving leaves		
Return to work gradually after childbirth/adoption	73	44
Flex careers		
Take sabbaticals/leaves (paid or unpaid) and return to a comparable job	29	9

Note: The percentages above do not add to 100% because some response categories are omitted.

Source: Adapted from Matos, K. & Galinsky, E. (2012). *2012 national study of employers*. New York, NY: Families and Work Institute. Retrieved from http://familiesandwork.org/site/research/reports/NSE_2012.pdf

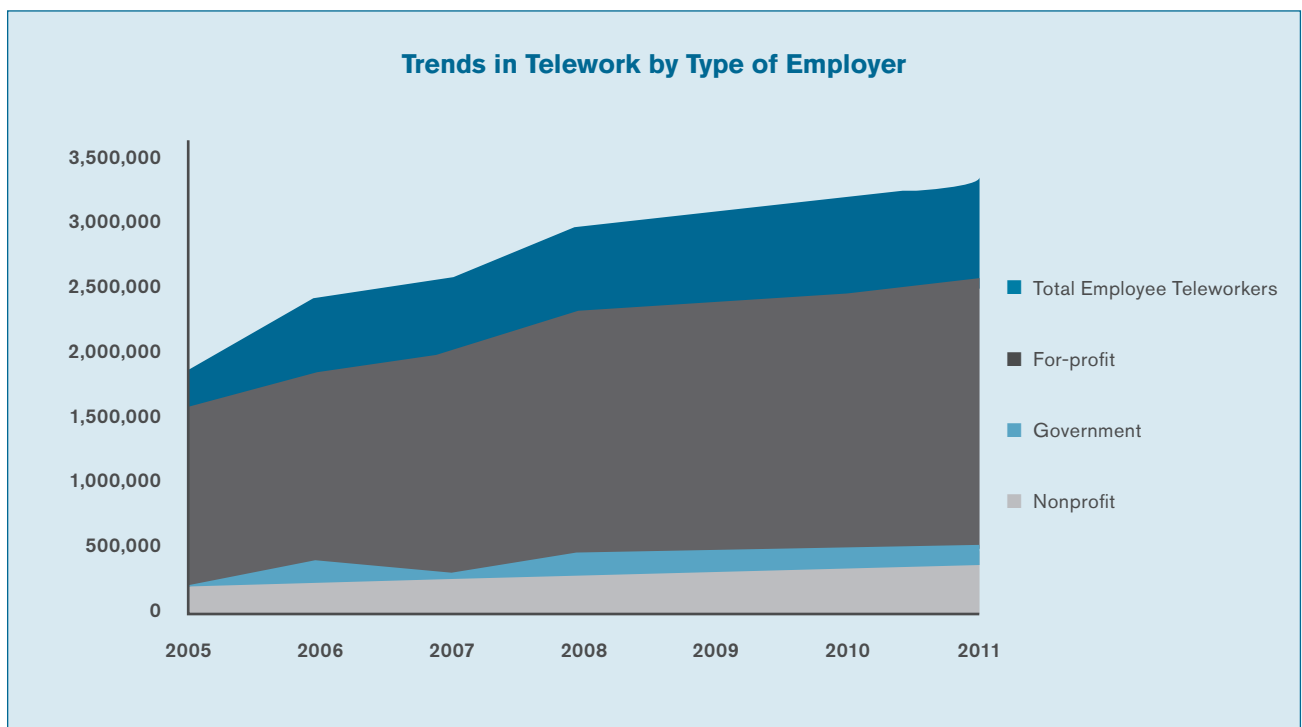


Studies show that employees of all ages, family backgrounds and jobs value work/life flexibility. This is soon expected to become the “new normal” for conducting business.

APPENDIX C: TRENDS IN TELEWORK BY TYPE OF EMPLOYER⁶⁰



Based on a special analysis of the latest American Community Survey data (2011 data based on surveys conducted in 2010 to 2011) done by the Telework Research Network, 2.5 percent of the U.S. employee workforce (3.1 million people, not including the self-employed or unpaid volunteers) considers home their primary place of work. One of the biggest supporters of telework is the U.S. federal government, which passed the Telework Enhancement Act of 2010⁶¹ to ensure that continuity of operations and essential government functions are maintained during emergencies, promote cost savings from reductions in organizational and transit costs and environmental impacts, and enhance the work/life fit of workers.






APPENDIX D: FLEXIBILITY METRICS⁶²



Categories	Flexibility Metrics
Financial	<ul style="list-style-type: none"> • Reduce regretted turnover rate • Increase shareholder value • Increase sales • Provide reasonable return on investment (ROI)
Operations	<ul style="list-style-type: none"> • Increase productivity • Increase efficiency • Reduce (specific) costs
Customers	<ul style="list-style-type: none"> • Improve customer satisfaction • Retain the best (most profitable) customers
Employees	<ul style="list-style-type: none"> • Recruit and retain the best talent • Improve employee engagement
Society	<ul style="list-style-type: none"> • Advance progress on a pressing societal need • Provide stewardship for the environment



Flexible work options are more likely to be successful when an organization encourages managers and employees to view flexibility as a mutually beneficial business process for determining the best approach to how, where and when work is done.

APPENDIX E: WORKPLACE FLEXIBILITY LEGAL TRENDS



In an article by Littler Mendelson and FlexPaths,⁶³ legal considerations are discussed, with an emphasis on the importance of establishing flexible work practices that are and continue to be legally compliant, just as other human resource and personnel policies and practices are. There are several areas of particular importance related to the different types of workplace flexibility. Legal implications are complex and vary, so consulting with experts is advised.

With telework, organizations have to be mindful of how time spent traveling from a home office to an employer's location is treated (i.e., whether travel time is treated as work time). At the beginning of a flexible work arrangement, clarify what qualifies as compensable travel time.

Regarding safety issues, when an employee is working in a home office, the Occupational Safety and Health Administration (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.

Two other issues for teleworkers and their employers involve how employees handle confidential and private information and taxes. In cases of employees working in a different state from their employer, there are two specific considerations: a) the proper state in which to report and pay unemployment insurance taxes, and b) state income tax withholding.

Part-time work schedules present additional legal considerations.

Laws vary from state to state and may change periodically. For example, in states where daily overtime is required, an employee who works less than full time may still be entitled to overtime pay if the employee works more than eight hours in a given day. As a general rule, an employee's use of workplace flexibility should not influence the individual's eligibility for participation in an employer-provided employee benefits plans and arrangements. One exception to this rule, however, is with respect to part-time, seasonal and temporary workers. An employer must decide whether to provide certain employee benefits to these workers.

Among the several key recommendations the article presents are the following:

- The organization's legal counsel and HR department should work together closely, so that after legally compliant policies and protocols are established, they are communicated, understood and followed consistently across the organization.
- Managers, employees, leaders and work teams should be trained as new policies and protocols are rolled out, and they should have ongoing guidance—through live or online training, or other means.
- Methods and mechanisms should be established for accurately and efficiently tracking access to and use of flexible work options among employee subgroups and work units to identify discrimination issues and areas that need improvement and to measure success.

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The nature of work is changing...

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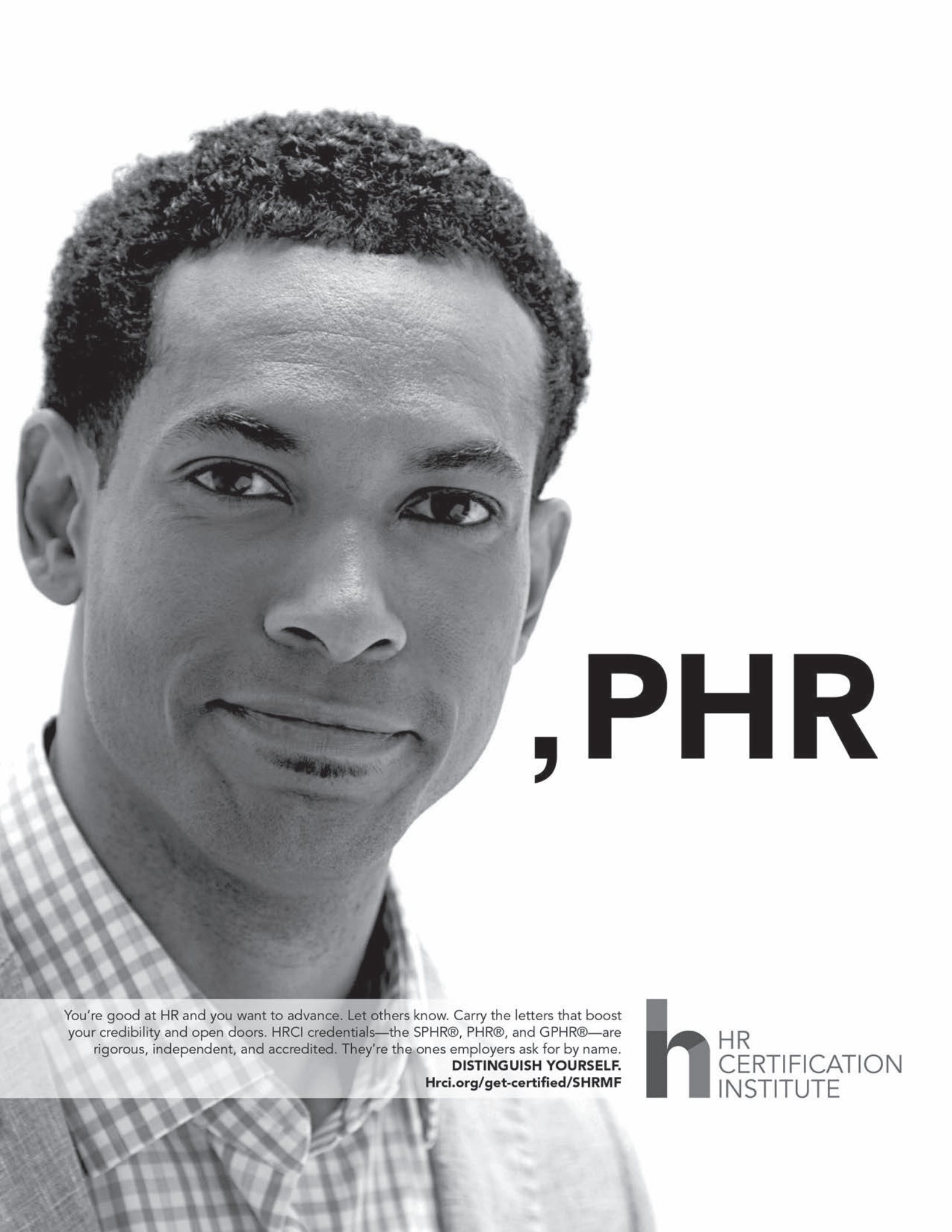
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- In the U.S., by 2050, the number of workers aged 65 years or older is expected to grow by 75%, while the number of workers aged 25 to 54 is only expected to grow by 2%.
- Increasing labor costs in China may prompt U.S. companies to move manufacturing operations to countries such as Vietnam, Indonesia or Mexico, or even back home.
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