

Workflex Employee Toolkit



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Acknowledgements

Families and Work Institute (FWI) and the Society for Human Resource Management (SHRM) would like to thank Life Meets Work for contributing its assistance in the content and design of this Workflex Employee Toolkit. www.lifemeetswork.com



When Work Works is a nationwide initiative that brings research on workplace effectiveness and flexibility into community and business practice. Since its inception in 2003, When Work Works has partnered with an ever-expanding group of communities from around the country to: share rigorous research and employer best practices on workplace effectiveness and flexibility; inspire local employers to create more flexible and effective workplaces to benefit both business and employees; and recognize exemplary employers through the When Work Works Award and local community events. www.WhenWorkWorks.org



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Families and Work Institute (FWI) is a nonprofit center dedicated to providing research for living in today's changing workplace, changing family and changing community. Since the Institute was founded in 1989, our work has tackled issues in three major areas: the workforce/workplace, youth and early childhood. In 2016, Mind in the Making, our major child development initiative, became a program of the Bezos Family Foundation and the National Study of the Changing Workforce, the National Study of Employers and When Work Works became projects of the Society for Human Resource Management (SHRM).

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Table of Contents

Preface	5
CHAPTER 1: What Is Workflex?	6
1A. Defining Workflex	6
1B. Why Workflex? Your Reasons	7
1C. Why Workflex? The Business Case	8
1D. Workflex Options	9
CHAPTER 2: Workflex and Your Career	13
2A. Common Employee Concerns About Workflex	13
2B. Values-Based Decision Making	15
2C. Evaluating Your Workflex Goals	16
CHAPTER 3: Requesting Workflex — Step 1: Assessment	19
3A. Culture of Flexibility	19
3B. Self-Assessment: Performance and Work Habits	23
3C. Self-Assessment: Organizational Considerations	24
CHAPTER 4: Requesting Workflex — Step 2: Making Your Request	27
4A. Guidelines for Making a Workflex Request	27
4B. Drafting a Proposal	28
4C. Trial Period	32
4D. If Your Request Is Denied	33
CHAPTER 5: Job Search: Finding Workflex-Friendly Employers	35
5A. During an Interview	36
5B. After an Interview	36
CHAPTER 6: Flex Success Strategies	37
6A. Communication	37
6B. Creating a Workflex Communications Plan	38
6C. Building Team Relationships	39
6D. Working as a Workflex Team	41
6E. Managing Expectations	42
6F. Staying Visible and Promotable	43

6G. Setting Boundaries	44
6H. Setting Up a Home Office	45
CHAPTER 7: Adjusting a Flex Arrangement	47
7A. Notice and Transition Time	47
7B. "Flexible" Workflex	47
7C. No Position Protection	49
CHAPTER 8: Building Support for Flex	50
8A. Making Connections	50
8B. Creating an Employee Resource Group	51
8C. Getting Employees' Ideas Heard	51
8D. Sharing Success Stories	51
Conclusion	53
Resources	54

Preface

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

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

About This Toolkit

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

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

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

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

CHAPTER 1: What Is Workflex?

In this toolkit, we use the term “**workflex**.” This word combines flexibility and effective workplaces.

By flexibility, we focus on how, when and where work gets done in ways that work for everyone (including families, clients, coworkers and communities). The kind of flexibility we envision is a dynamic process by which employers and employees collectively create work strategies to help employees simultaneously achieve personal and professional goals.

We see flexibility as *one* component — albeit an essential one — of an **effective workplace**. In other words, flexibility in and of itself is not like a vaccine, able to have magical results all by itself. By this we mean that if employees have flexibility but no learning opportunities, they won't be as engaged as they would be if they had both. Or, if they have flexibility, but have supervisors who don't support the employees' work success, they would be less likely to want to remain with their employer than if they had both flexibility and a supportive supervisor.

1A. Defining Workflex

What do we mean by an effective and flexible workplace or “workflex?” Over the past decade, we have engaged in a research journey to define the elements that make up effective workplaces. Based on Families and Work Institute's National Study of the Changing Workforce data, we have identified six criteria of effective workplaces that include both work and non-work factors, all of which benefit both the employee *and* the organization.

You will note that our definition of work-life fit includes not only access to flexibility, but also support from the supervisor, coworkers and the organization in using it — all of which are critical to its impact. We call this **workflex**.

We've identified the six components of effective and flexible workplaces or workflex:

1. **Opportunities for Learning**

A job where the meaning and importance of the work is clear, that encourages learning and creativity and has enough task variety to keep you interested

2. **Culture of Trust**

A workplace culture where supervisors are trustworthy, ethical, and seek your input to improve performance

3. **Work-Life Fit**

Having the support from coworkers and supervisors, schedule and flexibility you need at work in order to effectively manage your work and personal/family responsibilities

4. **Supervisor Support for Work Success**

Supervisors who provide you with honest and relevant information needed to do your job well and who recognize you when you a job is well done

5. **Satisfaction with Earnings, Benefits and Advancement Opportunities**

Having reasonable benefits and earnings for your job and adequate opportunities for advancement

6. **Autonomy**

The ability to decide or have input into what your job entails, how it is done and to be true to yourself while doing it

You may be thinking that workflex is a benefit or an accommodation — basically something your employer “allows” you to do because you don’t fit the standard mold for how work gets done. Frankly, yes, some employers still see it that way. But the conversation is changing and needs to change.

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

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

The focus of this Toolkit is primarily on the flexibility aspect of workflex, but we encourage you to see flexibility as a component of an effective workplace throughout.

1B. **Why Workflex? Your Reasons**

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

- Manage elder care issues
- Avoid peak commute times
- Reduce commute
- Use alternative transportation
- Work when you feel most productive
- Work when and where you have fewer distractions
- Train for a sporting event
- Exercise more
- Maintain or improve your health

- Pursue an interest or hobby
- Have more time to spend with family
- Know your schedule further in advance
- Reduce schedule conflicts
- Be able to schedule doctor, repair and other significant appointments during the workweek
- Volunteer during your normal work hours
- Take an extended vacation
- Care for a sick family member

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

1C. Why Workflex? The Business Case

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

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

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

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

1D. Workflex Options

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

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

CHOICES IN MANAGING TIME

ARRANGEMENT	DESCRIPTION	BENEFIT	EXAMPLES
Shift Trading	Trading work shifts with coworkers to adjust your schedule	Gives you more control over your time	Employees swap shifts directly Employees drop shifts into a pool where they can be picked up by coworkers
Self-Scheduling	Selecting your own shifts based on pre-set criteria	Gives you more control over your time i.e., when you take breaks or work overtime	Using scheduling software, employees set their own schedules without the need for supervisor intervention
Uninterrupted Time	Specific days or blocks of time when no meetings are scheduled or when coworkers don't interrupt you	Creates uninterrupted time for concentrated work Enables you to schedule your vacations when you know you won't miss important events or meetings	Regular set-aside time when you are free to concentrate No meeting days No meetings after 3 pm, for example

REDUCED TIME

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

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

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

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

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

WORKFLEX VOICES

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

Product Manager, TURCK (sensor manufacturers)

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

Pharmacist, WellStar Health System

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

Financial Reporting Manager, Midwest Medical Device Company

“Two-thirds of my team works from home two to three days a week, with individual agreements on meeting attendance, communication expectations and mutual trust.”

Manager, Healthwise

“I had to have my gallbladder removed recently, and it meant four weeks at home. Because I was already set up to telework, I was able to work from home that entire month. It was seamless! My boss didn’t have to worry about assigning my colleagues to cover for me.”

Director of Marketing, McGladrey LLP

“One associate needed to adjust her schedule to attend school and still work her standard number of hours. We were able to arrange her schedule to spread her work over four days rather than the standard fiveday workweek.”

Manager, 1-800 Contacts

“I advocate that staff take advantage of our flexibility policies — working from home, working a compressed workweek and taking care of personal business during the work day. They understand that what affords us this flexibility is continuously delivering on what is expected from us as a team. They know that I will ask them to change a plan if it is critical to the business. If a team member is not carrying their weight, I will deal with it. I assign my team big goals, equip them and let them go.”

Manager, National Student Clearinghouse

CHAPTER 2: Workflex and Your Career

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

2A. Common Employee Concerns about Workflex

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

CONCERN #1

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

SOLUTION

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

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

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

CONCERN #2

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

SOLUTION

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

If this is your situation, you have a few options. You can do some research (find case studies online, talk to others in similar organizations) and make a business case, showing how workflex will help your organization. Show your supervisor how other organizations or departments

like yours have made it work. Help problem solve. Ask for workflex on a specified trial basis to assess how it can work best and set clear metrics for assessing its effectiveness.

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

CONCERN #3

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

SOLUTION

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

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

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

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

CONCERN #4

What if I want a different workflex option later on?

SOLUTION

You will probably find that your desire and need for workflex will change throughout your career. For example, you may need short-term emergency time off or longer-term leaves at various points in your career. You may want to dial your career up or down — sometimes working a traditional schedule, other times working part time or flexibly. Likewise, your employer may have different needs over time too, such as during a business downturn or expansion. In addition, your employer may add new ways of working flexibly to what it offers.

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

CONCERN #5

Will workflex impact my income?

SOLUTION

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

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

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

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

However, there's no right or wrong decision — only what makes the most sense for *you*, given your short-term and longer-term needs.

2B. Values-Based Decision Making

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

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

- Your work-life values
- Your “need” versus “desire” for workflex

- Your job skills or profession
- Your long-term career goals
- Your finances
- Your employer’s needs



2C. Evaluating Your Workflex Goals

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

YOUR JOB/CAREER

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

YOU AND YOUR RELATIONSHIPS

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

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

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

YOUR GOALS AND INTERESTS

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

YOUR FINANCES

6. How much do you need to earn to meet your financial commitments? If you want to work less than full-time, how will that impact your short-term and longer-term financial needs?

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

WORKFLEX VOICES

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

Laundry Team Member, WellStar Health System

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

Marketing and Communications Manager, Green Bay Area Chamber of Commerce

"During the busy season, we are required to work at least 55 hours a week. My team and I decided to work 11 hours each day in order to have weekends off."

Manager, BDO USA, LLP

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

Marketing Assistant, American Foundation of Counseling Services

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

Buyer (hourly employee), TURCK

"By knowing their schedules and commitments. One employee on my team picks up her child between 5 pm and 6 pm, but will handle things once she puts her child to bed. If I send her a message around that time, I'll mention that I know she can't answer now, but to please do so when she can — and she always does!"

Manager, KPMG LLP

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

Employee, Toyota Financial Services

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

Employee, Ryan LLC

"It was hard to offer our receptionist position flexibility since it is important for the company to have someone at the front desk at all times. We split the position into two part-time roles to allow for more flexibility with general work hours free to take care of personal business and the ability to switch shifts and cover for each other as things come up."

Manager, Healthwise

Chapter 3: Requesting Workflex

Step 1: Assessment

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

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

When Work Works conducts free, annual assessments of workflex for participating organizations through the annual **When Work Works Award**. The assessment compares employers' policies with nationally representative data on workflex. The top scoring employers are invited to complete an employee survey to confirm that employees are getting the most out of an organization's policies. All participants are given a free benchmarking report on how their workflex compares to the national average and to other participants. High scoring organizations are eligible to be recognized as winners of the **When Work Works Award** and receive free national publicity from **When Work Works**, the **Society for Human Resource Management** and local publicity from **When Work Works community partners**.

3A. Culture of Flexibility

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

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

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



1. Human Resources

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

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

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

2. Employee Work Styles

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

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

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

3. Workflex Precedents

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

Was workflex successful for your coworkers or did it create challenges? What kind of challenges?

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

4. Your Supervisor's Perspective

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

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

What objections might your supervisor have toward a workflex arrangement? How can you respond constructively to those objections?

5. Type of Flex Culture

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

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

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

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

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

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

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

3B. Self-Assessment: Performance and Work Habits

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

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

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



PERFORMANCE AND WORK STYLE SELF-ASSESSMENT

Rate these questions using the following scale:

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

I can manage my work responsibilities by planning ahead. _____

I can manage my work responsibilities by prioritizing what's important. _____

I regularly meet deadlines. _____

When work problems arise, I can problem solve and resolve issues independently. _____

I am focused and productive when I'm working. _____

I communicate well with my supervisor and keep him/her informed. _____

I scored "satisfactory" or better on my last performance evaluation. _____

I am a team player. _____

I plan well with my team. We set clear responsibilities and follow through on tasks. _____

I communicate well with my coworkers and keep them informed. _____

Now rate these questions using this scale:

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

I understand how my organization does or could benefit from workplace flexibility. _____

I am prepared to meet the level of availability and responsiveness required to meet the needs of my organization. _____

I understand how my team’s work requirements contribute to organizational success. _____

I understand the results that I am responsible for. _____

I understand that flexibility must work for my coworkers, my supervisor and my organization as well as me. _____

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

51-60: You’ve Got It!

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

37-50: Growing Everyday

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

17-36: Invest in Yourself

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

3C. Self-Assessment: Organizational Considerations

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

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

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

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

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



WHAT WILL MY SUPERVISOR THINK?

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

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

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

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

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

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

Chapter 4: Requesting Workflex

Step 2: Making Your Request

“Employee requests were the top reason that prompted organizations to offer workflex.”

– *SHRM Research: Workplace Flexibility in the 21st Century*

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

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

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

4A. Guidelines for Making a Workflex Request

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

A request for a flexible work arrangement should reflect a:

- well thought out business case that considers the needs of the organization and your co-workers as well as your needs — how your work arrangement will affect your department or team and your ability to fulfill your obligations and have your department succeed;
- commitment to share the responsibility to make a flexible work arrangement successful;
- understanding that a flexible work arrangement is not an entitlement, but rather, another way of meeting organizational goals;
- team attitude; and
- metrics for measuring your success.

Think critically about how a flexible work arrangement will affect your department or team, your customers (internal or external) and your ability to meet performance goals. Your supervisor may be responsible for determining whether or not flexibility will work within your department

or team, or the decision may rest with higher-level managers. He or she should be expected to evaluate your request based on how well the arrangement will help maintain (or improve) the department's ability to meet its business needs.

4B. Drafting a Proposal

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



WHY

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

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

WHEN AND WHERE

What type or types of workflex are you interested in?

How long do you plan to work the arrangement(s)?

What hours and days are you proposing to work and from what location(s)?

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

AVAILABILITY

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

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

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

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

IMPACT ON COWORKERS AND CLIENTS

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

Who will be most impacted by this flexible schedule?

Will this improve service in any way?

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

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

COMMUNICATION

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

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

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

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

4D. If Your Request Is Denied

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

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

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

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

REASON 1

Flex Isn't Possible for Your Position

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

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

REASON 2

Your Supervisor Is Unsupportive

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

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

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

REASON 3

Performance Issues

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

Chapter 5: Job Search

Finding Workflex-Friendly Employers

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



SEARCHING FOR A WORKFLEX-FRIENDLY EMPLOYER

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

IF YOU'VE IDENTIFIED SOME POTENTIAL EMPLOYERS	Complete
Search employer Websites for recruitment information. Some organizations will highlight work-life benefits and flexible work options because it makes them attractive to job candidates.	
Consult with people who work for your potential employer or look online at employee review sites, such as Glassdoor.com, for an inside look at how flexibility is really being utilized by employees.	
Use social media (Twitter, LinkedIn) to find former employees and ask questions about work culture. (Always be professional and only ask questions and make comments using social media that you would be comfortable having an employer see now or in the future.)	
Look for articles about the organization's workplace culture.	
IF YOU'RE LOOKING FOR ANY WORKFLEX EMPLOYERS	Complete
Many award programs exist to recognize organizations that provide work-life benefits and flexible work options. If you're not sure where you want to apply, you might start by browsing lists of award winners. Some more well-known programs include the When Work Works Award , <i>Working Mother</i> Top 100 and <i>Fortune Magazine's</i> Best Places to Work (among others).	
You can search the interactive When Work Works Award database at http://www.whenworkworks.org/search-recipients	
Check with your SHRM chapter. They may coordinate the When Work Works Award for your region.	

5A. During an Interview

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

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

5B. After an Interview

Arrange to talk with current employees in the team or area in which you would be working. Ask them what it's like to work there. Ask questions that indicate the organization's commitment to areas that we've identified as being part of an effective and flexible workplace. These include opportunity for learning; autonomy; supervisor support for work success; culture of trust; satisfaction with earnings, benefits and advancement opportunities; and work-life fit.

Chapter 6: Flex Success Strategies

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

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

6A. Communication

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

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

6B. Creating a Workflex Communication Plan

HOW AND WHEN TO REACH YOU	Complete
Decide if and how you will be accessible when you are not in the office. Take others' needs into account when you consider these decisions.	
Decide when you will be available for calls — which days, what hours? Are there specific hours when you must be available? Are there specific hours when you can't be available? What will you do when others must reach you?	
Inform others on how and when you can be reached (cell phone, home phone, e-mail, etc.).	
CUSTOMERS/CLIENTS	Complete
Discuss with your supervisor the potential impact on your customers or clients and decide whether or not to notify them of your workflex arrangement.	
If appropriate, determine the best way to communicate with your customers or clients such as when, where and how you can be reached, and who can assist them in your absence.	
If there are new or additional people with whom the customer will be working, set up a meeting to make introductions.	
MEETINGS	Complete
Agree with your supervisor on when staff meetings will be scheduled.	
Identify some contingency plans in the event a meeting is called on short notice.	
Decide if and how you will be available for meetings on days when you are not working (e.g., in person, via phone or video conference).	
INFORMATION	Complete
Inform your team members where critical information is kept (e.g., filing system, computer access, addresses and contact information, your calendar).	
Make sure necessary computer files are shared with others who might need access to them.	
If you are working away from your worksite, determine how you will access information you might need.	
FEEDBACK	Complete
Encourage your supervisor, coworkers, customers or clients and others to give you feedback on how the new work schedule is working for them.	
Establish regular check-in meetings with your supervisor — either face-to-face or through phone conferences — so you can talk about what's working, what's causing challenges and how to resolve them.	

WORKFLEX VOICES

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

West Coast Client Relations Director, Bright Horizons Family Solutions

“We use our calendars a lot to show who is going to be in/out of the office. Also, we’ve changed our review process so that we are not moving papers from one desk to another. We use e-mail to review and provide initial feedback to each other; that way, no one feels like they need to be in the office. On days we are all in the office, though, we take our lunches together to catch-up and have face-time to make up for the days when we only have virtual conversations.”

Manager, Ryan, LLC

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

Employee, Toyota Financial Services

6C. Building Team Relationships

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

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

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

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

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

WORKFLEX VOICES

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

Director of Technology Operations, TCP

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

Vice President, Aqua Slug Services, Inc.

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

Regional Performance Consulting Services Specialist, John Deere

"A number of employees pitched in to donate our PTO to a team member who was going on paternity leave. Donating PTO had unfavorable tax implications, so instead, we arranged for the organization to pay the team member the equivalent dollar amount of the PTO."

Manager, The Climate Trust

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

Build Time into Your Workweek for Some Social Conversations

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

Be Visible

Use your organization's collaboration software (such as instant messaging or video conferencing) so your home office colleagues can always see when you're at your desk. Share a picture of yourself in your remote workspace. Encourage your supervisor to post your picture in a visible place, so everyone remembers you're part of the group. We even know of a company that

tacks pictures of remote employees to the conference room chairs when team members join a meeting via conference call. Don't be afraid to suggest your work group does the same!

Participate

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

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

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

6D. Working as a Workflex Team

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

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



WORKFLEX CHECK-IN QUESTIONS

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

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

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

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

6E. Managing Expectations

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

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

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

Find Measurable Results

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

Define Objectives

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

Communicate

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

Cynthia Calvert, author of *Flex Success: The Lawyer's Guide to Balanced Hours*, says employees need to combat the stigma associated with flexible work arrangements head on. Instead of waiting for challenging assignments to be thrown your way, be proactive in volunteering for them.

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

Be Realistic

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

Know Your Record

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

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

6F. Staying Visible and Promotable

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

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

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

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

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

WORKFLEX VOICES

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

Employee Benefits Manager, Sonoco

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

Former Director of Content Development, Winning Workplaces

“My team makes heavy use of remote/asynchronous communication through e-mail and chat to trade assignments with short deadlines that aren’t compatible with personal schedules. As long as the trades are roughly equal and no one feels like they are required to do another person’s share, this has proven to be a good way of accommodating personal preferences in a 24/7 deadline environment.”

Manager, Research Square

6G. Setting Boundaries

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

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

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

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

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

WORKFLEX VOICES

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

“For me, it was about being realistic about my workload. It’s pretty easy to fall back into taking on more projects. The biggest challenge is learning to say no ... We have a BlackBerry/cell phone landing that sits on the back porch, and we don’t let them in the house. I don’t carry it with me. I try to physically avoid it. Of the two days I’m off, at least one day, I will check and do a scan that maybe takes me 30 or 40 minutes. If a problem crops up, then yes, I might be working an extra half day to address it ...

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

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

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

6H. Setting Up a Home Office

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

Dedicate a Work Space

Create a specific work space free from distractions or family public areas. Your desk and work area should be maintained in a safe, hazard-free, ergonomic condition. Invest in furniture that will keep you comfortable throughout the workday. Check with your employer or a consultant in your community for a professional ergonomic evaluation, or use one of the free self-assessments from the **National Institute of Health**.

Establish Boundaries

Maintain clear boundaries between your work and home spaces. Ideally, work in a separate room from the rest of your home activities. If a separate space isn’t reasonable, look for ways to transition your space between work and personal time. For example, you can maintain a clean desk policy and store all your work and personal papers in separate drawers, so you won’t be

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

Storage

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

Security

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

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

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

WORKFLEX VOICES

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

Former Director of Content Development, Winning Workplaces

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

Administrator, Creative Publishing

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

Director of Operations, TCP

Chapter 7: Adjusting a Flex Arrangement

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

7A. Notice and Transition Time

Terminating Workflex

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

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

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

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

Blackout Dates and Suspensions

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

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

7B. “Flexible” Workflex

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

You expect your employer to be flexible with you; likewise, you need to be flexible with your employer. While setting boundaries and reminding others of your schedule can help them plan around your workflex, sometimes you'll need to adjust your schedule to respond to the needs of your employer. It sends a strong message that you recognize flex is a two-way street and are willing to work with your employer so that workflex is a win-win.



CONTINGENCY PLANNING

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

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

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

7C. No Position Protection

Unlike the Family and Medical Leave Act (FLMA) that allows certain employees to take job-protected leave for family and medical reasons, few protections are available for workflex. (Employees covered under the Americans with Disabilities Act may be protected.) For instance, if you negotiate part-time work or a compressed workweek, your employer is under no obligation to allow you to return to a full-time or regular schedule. As a rule, we see reduced work hours as including the possibility of returning to full time as the organization's economic situation permits.

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

Chapter 8: Building Support for Flex

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

8A. Making Connections

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



ENGAGING LEADERS

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

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

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

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

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

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

8B. Creating an Employee Resource Group

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

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

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

8C. Getting Employees’ Ideas Heard

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

8D. Sharing Success Stories

Another common tool for promoting workflex is to share employee work-life success stories. In large organizations with established work-life advocates, it’s common to find these stories on

your organization's Intranet or in a monthly newsletter. Smaller organizations can leverage the power of storytelling, too!

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

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

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

WORKFLEX VOICES

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

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

"Flexibility is great when working around the globe. We are able to provide testing and problem solving almost around the clock through communicating and transferring ownership to colleagues in India, Europe and the USA."

Manager, d-Wise Technologies, Inc.

"My general rule: Set expectations early. Guide work productivity based on output and outcomes, and leave management of input (time spent) and process (how to produce) to my team."

Manager, HawaiiUSA Federal Credit Union

Conclusion

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

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

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

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

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

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

Resources

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

When Work Works: [WhenWorkWorks.org](https://www.whenworkworks.org)

[SHRM Workplace Flexibility Resource Page](#)

[Guide to Bold New Ideas](#): free searchable tool featuring WWW Award winners. Look up top employers by size, industry, location or type of flexibility program.