

GUIDE FOR  
IMPLEMENTING  
FLEXIBILITY  
with an Hourly and  
Nonexempt Workforce

## Introduction

Research has found that people are more productive at work when they have the flexibility to successfully manage their lives outside of work. Many organizations are seeking to create a flexible work environment in which they can respond in the most agile way to business demands while providing employees with the control and influence over their own quality of life. The following tips will assist you when you initially discuss a flexible work arrangement with your manager and also when you are using a flexible work arrangement, if it is approved.

## Benefits of Flexibility

Some of the most creative and effective uses of flexibility are being implemented at the workgroup/team level, particularly with hourly and nonexempt workforces. When team members are engaged in discussions to determine flexible ways of working to meet their needs while ensuring that business requirements are met, it's a win/win. Flexible ways of working often enhance employee performance, engagement and ability to meet or exceed business requirements. Employees are more likely to be satisfied with their jobs, and organizations benefit by retaining key talent, helping to ensure coverage to meet business needs and potentially reducing overtime costs.

Business impacts of flexibility in an exempt and nonexempt workforce may include:

- *Attracting and retaining key talent* by providing desirable flexible work options in a competitive labor market;
- *Reducing costs of turnover* by retaining trained and skilled employees;
- *Reducing overtime and absenteeism* by providing options for expanded hours, coverage and ability to make up occasional, unanticipated time off;
- *Enhancing employee productivity, effectiveness and engagement* through increased employee empowerment and control over work schedules to meet personal needs and job requirements;
- *Expanding coverage* with schedules that meet customer/client and production needs as well as peak and valley staffing requirements;
- *Reducing cycle time* by letting employees work in ways that maximize their efficiency;
- *Improving employee satisfaction, morale and teamwork* by engaging employees in determining flexible work arrangements that work for them and the business and ensuring success through collaboration, mutual support and teamwork;
- *Improving employee health, well-being and resilience and reducing stress* of employees by having the flexibility and control over schedules to manage their work and personal responsibilities; and
- *Increasing customer/client service* through satisfied, committed employees.

## Defining Flexible Work Options

**Familiarize yourself with your company's flexible work option policies, guidelines and procedures, if available.**

Formal flexible work options may include the following, although *not all will be applicable to an hourly, nonexempt workforce*:

- *Flextime*: Modification in start and end times, often with required core hours for full-time employees;
- *Compressed workweek*: Compression of full-time job responsibilities into fewer than five days per week (often referred to as a 4/10) or fewer than 10 days in two weeks (often referred to as a 9/80);
- *Telework*: Full-time work conducted up to several days a week at a site other than the primary worksite;
- *Remote work*: Full-time work conducted at home or another site with limited presence at a regular company facility;
- *Part time*: Reduced hours or schedule, with a corresponding reduction in job responsibilities and pay and an adjustment of benefits; and
- *Job sharing*: Two employees on reduced schedules and workload share overlapping responsibilities of a full-time position, with a corresponding reduction in pay and an adjustment of benefits for each.

Other options might include:

- *Paid time off (PTO) and other time off*: PTO banks, use of sick and vacation time in part-day increments, and “just in time” time off;
- *Shift swapping*; and
- *Occasional flexibility*: Flexibility that is not regularly scheduled but is used from time to time (i.e., time off taken in small increments with the ability to make it up in the same pay period, shifting start and end times because of an appointment or event, working from home on occasion, etc.).

## Tips for Considering Which Option Might Be Right for You and Your Job

It is critical that you consider flexible work options in the context of your job responsibilities, current business conditions and personal work style. The *Flexible Work Arrangements Employee Self-Assessment Checklist* in the Appendix will help you determine if a flexible work arrangement might be a good fit for you. The checklist will help you consider whether you and your job are compatible with a particular flexible work arrangement. There are statements in each of four categories:

- Job requirements;
- Work style and personal characteristics;
- Personal expectations and tradeoffs; and
- Business impact on others.

Not all jobs can be done using all of the flexible work options included; there are some jobs that may not be appropriate for flexible work arrangements due to the nature of the tasks involved. However, be open to innovative approaches to working, with the idea that as long as business needs are being met, consideration should be given to flexible work options. If business conditions change or your job responsibilities change, it may be helpful to revisit the checklist and reassess the appropriateness of a flexible work option for you. If a formal flexible work arrangement is not a good fit for you, you may want to consider the use of occasional flexibility (i.e., time off taken in small increments with the ability to make it up in the same pay period, shifting start and end times because of an appointment or event, working from home in inclement weather, etc.).

### ***Wondering which flexible work option might be right for you?***

*Go to the Flexible Work Arrangements Employee Self-Assessment Checklist in the Appendix to evaluate how well a flexible work arrangement fits with your job responsibilities and personal characteristics.*

## Tips for Proposing a Flexible Work Arrangement

Some organizations have a formal process in place for requesting a flexible work arrangement; often this includes a flexible work arrangement proposal that an employee completes and submits to her manager. Other organizations implement flexible work practices without a formal process and request form. The following tips provide guidance for employees when proposing a flexible work arrangement, whether a formal process is in place or not. Though employees and managers will approach the issue of flexibility separately, the ultimate success of a flexible work arrangement depends on their collaboration in reviewing the proposed schedule together, implementing the flexible work arrangement if approved and assessing the flexible work arrangement on an ongoing basis.

As you develop a proposal for your flexible work arrangement, use the *Proposing a Flexible Work Arrangement Worksheet* in the Appendix to organize your thoughts. The following tips will help you in thinking about all aspects of a proposed flexible work option. You may submit your proposal in writing to your manager or use the worksheet as a guide for discussing your proposed flexible work arrangement with your manager.

*Be as detailed and specific as possible when describing your proposed flexible work arrangement.*

### ✓ Describe your proposed flexible work arrangement.

- Be as specific as possible.
- Describe the *differences* in the schedule you are proposing from your current schedule, including your proposed work days, start and end times, hours of work, and location.
- If applicable, include what days are on-site and off-site.

### ✓ Consider your job performance objectives.

- Think about and describe how you might enhance your performance on a flexible work arrangement through new and innovative ways of working.
- How will your proposed flexible work arrangement change your ability to meet those objectives?

### ✓ Think about how you currently accomplish your job.

- Who do you communicate with and how often?
- What deadlines do you have?
- Are there tasks or responsibilities that are unpredictable or variable?
- What about internal and external customer/client needs? How will you meet their needs when on your proposed flexible work arrangement?

- ✓ **Document how you will accomplish your job responsibilities and objectives** on your proposed flexible work arrangement.

For example:

- *My compressed workweek schedule will enable me to complete work before most of my co-workers come to the office or after most of my co-workers have left in the evening, allowing me to concentrate and work with better speed and accuracy.*
- *If I am working from home, I will participate in team meetings by conference call and attend important meetings in person if necessary.*
- *When working off-site, I will let my co-workers know how to reach me and change my voice mail and e-mail accordingly.*

- ✓ **Describe any changes in how you will accomplish your job tasks, responsibilities and objectives** while on your proposed flexible work arrangement.

- ✓ **Consider potential challenges your flexible work arrangement might raise** with your co-workers, manager(s) and customers/clients. What are some potential solutions to these challenges?

- You might want to discuss this question with your manager, workgroup and colleagues. Think about how your proposed flexible work arrangement might impact how you work with these people.
- Identify possible problems, including obvious ones (not in on Mondays) as well as more subtle ones (accessibility for unplanned meetings).

For example:

- *My co-workers may resent my new schedule and have concerns that I won't "carry my weight" and they'll have the burden of taking on some of my work.*
- *Internal customers/clients who are used to meeting with me in person may think I'm not as responsive if they need to call or e-mail me rather than simply stopping by my desk.*
- When considering the impact of your flexible work arrangement on co-workers, manager(s) and customers/clients, provide concrete potential solutions for any problems or challenges listed. Ideally, provide several possible solutions for each problem. Suggest alternatives that will meet the needs of the organization as well as all the individuals involved.

For example:

- *I will inform all my internal customers/clients of my new schedule, including when and how I can be reached, and assure them I will continue to be responsive to their needs.*
- *I will provide customers/clients, co-workers and my manager with my contact information.*
- *I will develop a backup plan for coverage during times I am not working.*
- *I will inform team members of my flexible work arrangement, schedule and contact information and ensure them I will continue to fulfill job requirements. I'll confirm what they need from me so I can successfully meet business needs without negative impacts while on my flexible work arrangement.*

- ✓ **Describe how you will evaluate and measure the success** of your flexible work arrangement in meeting job requirements and expectations.
  - Think about what job elements must be accomplished to make clear to both you and your manager that your proposed flexible work arrangement is working well.
  - Keep in mind that the opposite of the criteria you list may serve as a “red flag” or early warning that will alert you and/or your manager that modifications to your proposed flexible work arrangement may be necessary.
  
- ✓ **What are some critical factors for success of your proposed flexible work arrangement?** How will you know if they are in place?
  - Do you have the management support you will need?
  - Will you have the technology you need?
  - What other factors will affect the success of your proposed flexible work arrangement?
  
- ✓ **Develop clear and measurable goals and/or milestones for success.**
  - How specifically will you and your manager measure your performance on your proposed flexible work arrangement?
  
- ✓ **Suggest a review process and timeline** that you and your manager will use to assess the effectiveness of your flexible work arrangement.
  - Determine how often you and your manager will meet to discuss progress and evaluate the effectiveness of your flexible work arrangement.
  
- ✓ **Describe the process you will use to measure achievement of your goals.**
  - Use your job description or goals as a starting point.
  
- ✓ **Describe any additional equipment/expenses** that your proposed flexible work arrangement might require.
  - List all the equipment and related expenses, such as Internet connection, extra home telephone line, etc.
  
- ✓ **Describe any short- or long-term cost savings for the organization** that might result from your new flexible work arrangement to offset any expenses (i.e., real estate savings, decreased overtime).

## Tips for Talking to Your Manager about a Flexible Work Arrangement

### ✓ When starting a conversation:

- Arrange a specific time to speak with your manager about a flexible work arrangement rather than mentioning your interest as a passing comment.
- Prepare for your discussion. Use the *Proposing a Flexible Work Arrangement Worksheet* as you consider the business implications and consequences for your internal and external customers/clients, co-workers and manager(s).
- Remember that this is flexibility — remain flexible and be willing to make changes to meet business needs.

### ✓ Focus on performance.

- Emphasize your continued attention and dedication to results and meeting or exceeding expectations.
- Consider the needs of the business and your team when suggesting alternatives to traditional work hours and/or location.
- It is not necessary to give a reason for requesting a flexible work arrangement. Reasons should not factor into your manager's decision to approve or deny your flexible work arrangement request — your ability to meet your job requirements should be the primary consideration when your manager reviews your flexible work arrangement proposal.
- Be flexible. Remember that the needs of the business may make it difficult at times to follow your proposed flexible work arrangement.



## Tips and Strategies for Successful Flexible Work Arrangements and Occasional Flexibility

Flexible work arrangements and using occasional flexibility represent an approach to how, when and where work gets done that differs from many traditional assumptions. You should consider the following tips that have been shown to support the effective use of flexible scheduling:

- ✓ **Assess the effect of the flexible work option** on your work team, your customers/clients and your job performance. Considering the impact of a new schedule on other parties is necessary to develop an effective schedule that will be supported by your manager.
- ✓ **Understand compatibility with your job requirements** (refer to the *Flexible Work Arrangements Employee Self-Assessment Checklist* in the Appendix). Some jobs are strong candidates for flexible work arrangements, while others may not be as compatible with flexible work arrangements or may need more intensive planning to be effective.
- ✓ **Continue to meet or exceed your job objectives**; be sure your achievements are no less visible if you have a flexible work arrangement. Management must focus on and evaluate performance by results. Managers and employees need to collaborate to establish clear, measurable objectives (i.e., quality standards, project deadlines, budget objectives and customer input).
- ✓ **Communicate a change in schedule and/or location**. Because flexible work arrangements mean that all employees are not always in the office at the same time, it is critical that there be effective communication about how and when employees are accessible. Online calendars, team white boards, e-mail, voice mail and instant messenger can all be used to ensure that employees know how to reach colleagues.
- ✓ **Check in with co-workers**. It is especially important to keep co-workers informed of issues that affect them when not all members of a team are working in the same place during the same hours. Use e-mail or voice mail or a shared notebook to exchange updates with one another.
- ✓ **Partner with managers so flexibility will succeed**; reciprocity and the willingness to be flexible are critical. At times, to meet the demands of the business, employees will have to work hours they are not usually scheduled to work, and managers should simultaneously do their best to manage work demands in ways that respect employee schedules as much as possible.
- ✓ **Invite and encourage feedback from co-workers and your manager(s)** on your use of a flexible work arrangement. Be open to feedback — both positive and negative — as to how your flexible work arrangement affects your work and the work of others. Respect your co-workers — your flexibility should not result in more work for them or the need for them to be in the office longer hours. When flexibility is accessible to all employees, the likelihood of co-worker resentment should be limited. If there is tension or resentment because of an employee's flexible work schedule, then the situation needs to be evaluated and modifications may need to be made.

## Strategies for Success: Flextime

The following tips support effective implementation of a flextime arrangement.

- ✓ **Be flexible.** Your flexible work arrangement will not work if you are too rigid about your flextime schedule. There will be times when business needs will necessitate coming in earlier or later, similar to what happens with employees on “traditional” schedules.
- ✓ **Set appropriate schedules.** In designing a flextime schedule, you need to take into consideration when in the workday internal and external customers/clients typically need you the most.
- ✓ **Be accessible.** You can make yourself accessible for critical needs without being in the office at all times. If, for example, you are working an early flextime schedule and there is an important late-afternoon meeting, you would do well to be accessible in person or by phone for the meeting. Also, offering a certain degree of accessibility later in the day can be valuable when customers/clients or co-workers have an urgent or pressing matter that only you can address. Typically, people don’t take this offer lightly.
- ✓ **Communicate.** It is important for employees on flexible schedules to publicize their new schedule. Voice mail is a useful tool that informs people of your availability. You can have a standard message that includes your weekly schedule or a message that changes daily and explains how to reach you. In addition, most employees on flexible hours find the need to frequently remind others of their schedule through such means as a staff schedule white board or electronic calendar.

## Strategies for Success: Compressed Workweeks

The following tips support effective implementation of a compressed workweek arrangement.

- ✓ **Be flexible.** Compressed workweeks will not work if you are unable to be flexible on occasion. There may be times when reverting to a traditional five-day schedule is necessary (e.g., to participate in training or customer/client events or for coverage of shifts).
- ✓ **Communicate.** It is important for employees on compressed workweeks to publicize their new schedule. Voice mail and e-mail are useful tools that inform people of your availability. You can have a standard message that includes your weekly schedule or a message that changes daily and explains when you can be reached. In addition, most employees on compressed workweeks find the need to remind others of their schedule through such means as a staff schedule white board or electronic calendar.
- ✓ **Identify management coverage requirements.** Consideration should be given to potential supervision needs when you are on a compressed schedule. In cases in which supervision is necessary during extended hours, a backup team leader may need to be identified.
- ✓ **Be aware of overtime provisions.** Many organizations do not allow compressed workweeks that require overtime be paid due to state or federal law. It is important, therefore, that you and your manager understand the overtime requirements of both the federal Fair Labor Standards Act and the laws of your state. Often when state law requires overtime to be paid after eight hours per day or 40 hours per week, compressed workweeks will not be offered to the nonexempt population.

## Strategies for Success: Telework/Remote Work

The following tips support effective implementation of a telework or remote work arrangement.

- ✓ **Establish boundaries if you are working from home** — as much as possible, make a clear delineation between work space and home space.
- ✓ **Do not request a flexible work arrangement as a substitute for dependent care.** Though flexible work arrangements may be helpful in managing work demands and personal/family demands, it is often impossible to focus on work while simultaneously caring for a dependent.
- ✓ **Be creative in your thinking** — use conference calls and Internet applications when these technologies make sense.
- ✓ **Plan ahead** — if you will be teleworking, be sure that you have access to all the necessary documents and materials you will need.
- ✓ **Assess your technological capabilities at home** and consider if you will be efficient and productive as a teleworker/remote worker.
- ✓ **Be accessible.** Openly communicate with managers and colleagues about where you are working and when.
  - Establish accessibility plans — how you will be reachable if you are working at a location other than your company office.
  - Check e-mail and voice mail on a regular basis during times you are scheduled to be working.
  - If you expect that someone may need to speak with you immediately, leave a number where you can be reached on your outgoing voice mail.
  - Investigate the possibility of forwarding your calls from your office to an alternative phone number (home phone, cell phone, etc.).

For more tips on successfully teleworking or working remotely, see *Tips for Successful Telework/Remote Work* in the Appendix.

## Strategies for Success: Part Time

The following tips support effective implementation of a part-time work arrangement.

- ✓ **Match the reduced schedule to the requirements of the job.** It is important to figure out when in the workweek or workday customers/clients typically need you most. Are some days or parts of days better than others to be away from work? This information should be a factor in designing your reduced hours schedule. You will have to weigh your personal scheduling needs with those of your employer in proposing a flexible work arrangement. It also is important to be prepared to adjust schedules if they are not working.
- ✓ **Communicate.** It is important for part-time employees to publicize their new schedule when they first move to a flexible arrangement. In addition, most less-than-full-time employees find the need to remind others of their schedule through such means as a staff schedule, electronic calendar or note at their desk. It also is important to use an outgoing voice mail message and/or a signature at the bottom of e-mails to inform people of your schedule.
- ✓ **Maintain visibility.** Part-time employees should plan and act systematically to make themselves and their contributions visible. Among steps to take are consciously making connections with others when in the office and highlighting contributions to the team in meetings or via e-mail.

## Strategies for Success: Job Sharing

The following tips support effective implementation of a job sharing arrangement.

- ✓ **A compatible job sharing partner is essential.** One of the best ways to think about finding the right partner is to conduct an assessment of the skills needed to do your job in the best way possible and to then look at the skills that you are able to contribute. The right partner will have many, if not all, of the remaining skills to fill in the gaps. It is extremely important to find someone whose communication style is compatible with yours.
- ✓ **Specify roles and responsibilities.** Though there is no prescribed “ideal” division of responsibilities, successful job sharers identify early on who will do what. After deciding on a division of labor between themselves and in consultation with their manager, good job sharers will then communicate this plan to everyone who will be affected by the arrangement.
- ✓ **Explain the roles of job sharers.** Job sharers need to thoroughly explain their coverage of job responsibilities to co-workers, managers and customers/clients. Depending on the division of job responsibilities, others will approach one and/or the other job sharer. One model requires job sharers to keep each other informed of all aspects of the job with the expectation that both will be equally proficient at all times in communicating with others inside and outside of the organization. Another model holds each job sharer responsible for distinct pieces of the job and communicates to everyone involved which job sharer knows what.

## Appendix

**Flexible Work Arrangements Employee Self-Assessment Checklist**

**Proposing a Flexible Work Arrangement Worksheet**

**Tips for Successful Telework/Remote Work**

Share:    

*For more resources, go to [www.corporatevoices.org/publications/workplaceflex](http://www.corporatevoices.org/publications/workplaceflex)*

## Flexible Work Arrangements Employee Self-Assessment Checklist

This checklist will help you consider whether you and your job are compatible with a particular flexible work option. There are statements in each of four categories:

- Job requirements;
- Work style and personal characteristics;
- Personal expectations and tradeoffs; and
- Business impact on others.

Read each statement and select the box before the statement if it is true for you. You can then look across the row to see which flexible work options are most likely to be compatible with those statements you feel apply to you. Alternatively, if you have a particular arrangement in mind, you can focus on those statements for which there is a “●” in the column of the flexible work option in which you are interested. The statements are based on success factors for each option — the more matches you have, the more suited you are for that option. Few selected boxes will probably mean frustration and a lower chance of success. A very low number of selected boxes suggests you may need to revisit and redesign your flexible work arrangement to better fit your work style or job requirements. Look carefully at the items you do not feel describe you or your current situation — these are the barriers you may have to overcome in your flexible work arrangement.

*This checklist is meant as a guide and not an absolute “yes/no” decisionmaker.*

Managers evaluating flexible work arrangement proposals also may find this checklist useful as they consider the viability of a proposed flexible work arrangement.




## Job Requirements

<input checked="" type="checkbox"/>	Job Requirements	Flextime	Compressed Workweek	Part Time	Job Sharing	Telework/ Remote Work
<input type="checkbox"/>	My job requirements will allow me to shift my work to earlier or later hours.	●	●			
<input type="checkbox"/>	My job has independent, task-focused work.	●	●			●
<input type="checkbox"/>	I can provide others with information they need while on this flexible work arrangement.	●	●	●	●	●
<input type="checkbox"/>	I can obtain the information I need to do my work while on this flexible work arrangement.	●	●	●	●	●
<input type="checkbox"/>	I can control my workflow and deadlines.	●	●	●		
<input type="checkbox"/>	My job requirements will allow me to be off one or more days a week, shifting the work to earlier or later hours on other days.		●			
<input type="checkbox"/>	I can attend all regular mandatory/critical meetings and trainings while on this flexible work arrangement.	●	●	●	●	●
<input type="checkbox"/>	My job requirements can be scoped to fit within fewer hours per week.			●		
<input type="checkbox"/>	I can set an appropriate schedule that will serve customer/client needs.	●	●	●		
<input type="checkbox"/>	My job rarely has critical deadlines requiring significant additional hours.			●		
<input type="checkbox"/>	The job processes of the position that I would be sharing are amenable to being shared by two people.				●	
<input type="checkbox"/>	My job has tasks and responsibilities that can be done away from a company location.					●
<input type="checkbox"/>	My job does not require daily face-to-face customer/client or team contact.		●	●		●
<input type="checkbox"/>	I have adequate technology/equipment to perform the essential functions of my job away from a company location.					●
<input type="checkbox"/>	I have the training and support I need to perform my job while teleworking.					●
<input type="checkbox"/>	I will have access to the materials I need while teleworking.					●


## Work Style and Personal Characteristics

 Work Style and Personal Characteristics	Flextime	Compressed Workweek	Part Time	Job Sharing	Telework/ Remote Work
<input type="checkbox"/> I am comfortable making decisions independently.	●	●			
<input type="checkbox"/> I function well with limited or no supervision.					●
<input type="checkbox"/> I have strong self-management skills.	●	●			●
<input type="checkbox"/> I am organized.	●	●	●	●	●
<input type="checkbox"/> I consistently accomplish work assignments and meet deadlines without constant supervision.	●	●			●
<input type="checkbox"/> I am highly self-motivated.	●	●			●
<input type="checkbox"/> I am adaptable and flexible.	●	●	●	●	●
<input type="checkbox"/> I have communication skills strong enough to keep others apprised of my schedule and work processes.	●	●	●	●	●
<input type="checkbox"/> I am able to work independently during hours I am unsupervised.	●	●			●
<input type="checkbox"/> I am highly productive — and can sustain this over time.		●			
<input type="checkbox"/> I have the energy and stamina to concentrate and stay highly focused for long periods of time without burning out.		●			
<input type="checkbox"/> I can usually control when my work gets done in terms of hours and days.	●	●	●		
<input type="checkbox"/> Knowing that I have less time to get the work done on my part-time schedule, I can establish priorities effectively.			●	●	
<input type="checkbox"/> I can set realistic expectations for myself and others as to what can get accomplished on my part-time schedule.			●		
<input type="checkbox"/> I know how to delegate tasks and responsibilities as appropriate.			●	●	
<input type="checkbox"/> I will have sufficient contact with others at work to feel that I am an effective worker on my part-time schedule.			●	●	

## Work Style and Personal Characteristics *(continued)*

 Work Style and Personal Characteristics	Flextime	Compressed Workweek	Part Time	Job Sharing	Telework/ Remote Work
<input type="checkbox"/> I feel I can find the right job share partner and am ready to work as part of a team.				●	
<input type="checkbox"/> I am willing to spend extra time and effort working to build a solid, trusting job sharing relationship.				●	
<input type="checkbox"/> I can be focused and disciplined whether I'm working from home or in the office.					●
<input type="checkbox"/> I can perform as well or better working independently.	●	●			●
<input type="checkbox"/> I am able to work with limited or no face-to-face supervision.	●	●			●
<input type="checkbox"/> I have excellent organizational, time-management and planning skills.	●	●	●	●	●
<input type="checkbox"/> I have strong team-building and team-maintenance skills.	●	●	●	●	●
<input type="checkbox"/> I am comfortable working away from my colleagues.					●

## Personal Expectations and Tradeoffs

	Personal Expectations and Tradeoffs	Flextime	Compressed Workweek	Part Time	Job Sharing	Telework/ Remote Work
<input type="checkbox"/>	I can effectively balance my personal and/or family responsibilities and work commitments on this arrangement.	●	●	●	●	●
<input type="checkbox"/>	I understand that business needs may necessitate my changing my schedule or work location from time to time, and I accept that fact.	●	●	●	●	●
<input type="checkbox"/>	If I have dependent care responsibilities, there is flexibility in my dependent care options to allow shifts in my work hours or work location on occasion.	●	●	●	●	●
<input type="checkbox"/>	I have flexibility in my transportation options to allow shifts in my work hours.	●	●	●	●	
<input type="checkbox"/>	I will be creative and systematic in maintaining my visibility.	●	●	●	●	●
<input type="checkbox"/>	I will strive to attend scheduled face-to-face meetings to develop rapport with colleagues.	●	●	●	●	●
<input type="checkbox"/>	I have enough stamina to work longer days in exchange for longer blocks of personal time.		●			
<input type="checkbox"/>	I understand and accept that business needs may necessitate my working on a "day off" on occasion.		●	●	●	
<input type="checkbox"/>	I am assertive enough to promote my ability and desire to take on more challenging and visible assignments, when compatible with a part-time arrangement.			●	●	
<input type="checkbox"/>	I can set limits to avoid taking on more than my agreed-upon workload.			●	●	
<input type="checkbox"/>	I understand that my career advancement may slow if the part-time or job sharing arrangement I am proposing prevents me from participating in critical, challenging developmental or visible projects/work.			●	●	
<input type="checkbox"/>	I understand and accept the impact of a part-time schedule on my pay and benefits.			●	●	
<input type="checkbox"/>	I realize that with job sharing, sometimes I will be taking credit for what my partner does and sometimes taking blame, and I accept that.				●	

## Personal Expectations and Tradeoffs *(continued)*

<input checked="" type="checkbox"/>	Personal Expectations and Tradeoffs	Flextime	Compressed Workweek	Part Time	Job Sharing	Telework/ Remote Work
<input type="checkbox"/>	I understand that business needs may necessitate my coming to a company location on a teleworking day and accept that fact.					●
<input type="checkbox"/>	I can provide an efficient teleworking workspace free from background noise, household interruptions and distractions.					●
<input type="checkbox"/>	If I have dependent care responsibilities, my dependent care options will remain in place during my work hours.					●
<input type="checkbox"/>	I am capable of maintaining time boundaries as a teleworker — neither getting distracted from work nor ending up working all the time.					●
<input type="checkbox"/>	I realize that working from home can be isolating and feel that I can make adjustments to stay in touch with my co-workers and manager(s).					●

## Business Impact on Others

<input checked="" type="checkbox"/>	Business Impact on Others	Flextime	Compressed Workweek	Part Time	Job Sharing	Telework/ Remote Work
<input type="checkbox"/>	I can provide quality service to customers/clients while on the proposed flexible work arrangement.	●	●	●	●	●
<input type="checkbox"/>	I have a backup plan to get my work done when unexpected business needs arise without negatively affecting my co-workers, manager(s) and customers/clients.	●	●	●	●	●
<input type="checkbox"/>	I can be reachable in some way when I am not scheduled to work (with the understanding that this access will not be used on a regular basis).	●	●	●	●	●
<input type="checkbox"/>	I am prepared to be available, if necessary, when unexpected business needs arise.	●	●	●	●	●
<input type="checkbox"/>	There will be someone to respond quickly to customer/client needs if I am not at work at a company location without a negative impact on their job performance or personal needs.	●	●	●	●	●
<input type="checkbox"/>	I can arrange personal appointments at times that I am not scheduled to work.	●	●	●	●	
<input type="checkbox"/>	I will devise a communications plan so that my manager(s), co-workers and customers/clients know my schedule and whom to call for backup when I am not in the office, and I will take responsibility for communicating this plan.	●	●	●	●	●
<input type="checkbox"/>	My job sharing partner and I can divide tasks and responsibilities and design a schedule that will make our manager(s), co-workers and customers/clients feel they are dealing with one person.				●	
<input type="checkbox"/>	My job sharing partner and I will be able to provide quality service to customers/clients while job sharing without duplicating effort.				●	
<input type="checkbox"/>	I will take all reasonable steps to be accessible to colleagues and customers/clients, including having a voice mail message and/or e-mail signature indicating how and when to reach me.	●	●	●	●	●

## Proposing a Flexible Work Arrangement Worksheet

This worksheet will help you think about your potential flexible work arrangement and develop your proposal. Use this worksheet before speaking with your manager. You may want to consult with co-workers if you believe that would be appropriate. Be as specific and thorough as possible — use additional space for your answers as needed. For tips and guidance on completing this worksheet, consult the “Tips for Proposing a Flexible Work Arrangement” section of the *Guide for Implementing Flexibility with an Hourly and Nonexempt Workforce: Tips and Tools for Employees*.

**Describe your proposed flexible work arrangement.**

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**Consider your job performance objectives.**

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**Think about how you currently accomplish your job.**

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**Document how you will accomplish your job responsibilities and objectives on your proposed flexible work arrangement.**

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**Describe any changes in how you will accomplish your job tasks, responsibilities and objectives while on your proposed flexible work arrangement.**

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**Consider potential challenges your flexible work arrangement might raise with your co-workers, manager(s) and customers/clients. What are some potential solutions to these challenges?**

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**Describe how you will evaluate and measure the success of your flexible work arrangement in meeting job requirements and expectations.**

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**What are some critical factors for success of your proposed flexible work arrangement? How will you know if they are in place?**

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**Develop clear and measurable goals and/or milestones for success.**

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**Suggest a review process and timeline that you and your manager will use to assess the effectiveness of your flexible work arrangement.**

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**Describe the process you will use to measure achievement of your goals.**

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**Describe any additional equipment/expenses that your proposed flexible work arrangement might require.**

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**Describe any short- or long-term cost savings for the organization that might result from your new flexible work arrangement to offset any expenses.**

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## Tips for Successful Telework/Remote Work

When implemented successfully, telework/remote work benefits the business, teams and individuals. Successful telework/remote work requires drawing on strong time-management and organizational skills and being intentional about communicating and maintaining relationships.

### *Is Telework/Remote Work Right for You?*

Employees who adapt best to telework or remote work have an independent, effective work style and are engaged in the type of work that can be completed off-site, often with minimal in-person interaction with the on-site office. Employees well suited for telework/remote work exhibit work characteristics such as:

- ✓ Excellent organizational, time-management and planning skills;
- ✓ Self-motivation;
- ✓ Ability to work independently;
- ✓ Ability to set priorities and meet deadlines;
- ✓ Minimum requirement of social interaction during traditional work hours; and
- ✓ High degree of autonomy.

#### **Consider your work style and personal characteristics.**

- ✓ Do you function well with limited or no supervision?
- ✓ Do you consistently accomplish work assignments and meet deadlines without constant supervision?
- ✓ Can you be focused and disciplined no matter where you're working?
- ✓ Do you have strong organizational, time-management and planning skills?
- ✓ Working from home can feel isolating — will that be a problem for you?

#### **Consider your job requirements before requesting a telework or remote work arrangement.**

- ✓ Examine whether your work truly can be done at a location other than a company office location.
- ✓ Think about whether you can provide others with the information they need if you are working outside your office.
- ✓ Consider the effect of your teleworking on your customers/clients, colleagues and manager(s).
- ✓ Assess your technological capabilities at home — do you have the equipment you need to be efficient and productive?

If working off-site may have negative consequences for you, your colleagues, your customers/clients or the business, you may want to reconsider teleworking.

## Ensuring Success

### Plan to work off-site effectively.

- ✓ Establish boundaries if you are working from home — make a clear distinction between work space and home space, as well as work time and non-work time.
- ✓ Do not use flexibility as a substitute for child care or elder care — although working from home is often helpful in managing work and personal/family responsibilities, it is very difficult to focus on work while simultaneously caring for a dependent.
- ✓ Plan ahead — if you will be working from home, be sure that you have access to all the necessary documents and materials you will need.

### Focus on performance and results.

- ✓ Demonstrate your continued attention and dedication to results and meeting or exceeding expectations.
- ✓ Establish clear objectives and expectations with your manager(s) and make sure that your accomplishments, outcomes and deliverables are visible to managers and co-workers, as appropriate. Avoid being “out of sight and out of mind” — teleworking may require more frequently scheduled check-ins with your manager.
- ✓ Consider the needs of the business and your team when working from an alternative location.
- ✓ Be flexible. Remember that the demands of the business may occasionally make it necessary to be in the office at times you might otherwise be working off-site.
- ✓ Be proactive. Communicate project status, potential issues and next steps to appropriate stakeholders (manager, co-worker, customer/client, etc.).
- ✓ Invite and encourage feedback from co-workers and your manager(s). Be open to feedback — both positive and negative — as to how your telework/remote work arrangement affects your work and the people with whom you interact.

### Be accessible and responsive.

- ✓ Use appropriate technology (i.e., conference calls, e-mail, instant messenger) to stay connected with your manager(s), co-workers and customers/clients.
- ✓ Communicate with your co-workers and customers/clients, as appropriate, about where you will be working and the best method of contacting you.
- ✓ Check e-mail and voice mail on a regular basis.
- ✓ If you expect that someone may need to speak with you immediately, leave a number where you can be reached on your outgoing voice mail.
- ✓ Investigate the possibility of forwarding your calls from your office to an alternative phone number (i.e., home phone or cell phone).
- ✓ Indicate your accessibility when signing in to instant messenger if you and your team use that technology.

## CORPORATE VOICES FOR WORKING FAMILIES

Corporate Voices for Working Families is the leading national business membership organization representing the private sector on public and corporate policy issues involving working families. A nonprofit, nonpartisan organization, we improve the lives of working families by developing and advancing innovative policies that reflect collaboration among the private sector, government and other stakeholders.

To create bipartisan support for issues affecting working families, we facilitate research in areas spotlighting the intersecting interests of business, community and families: workforce readiness, family economic stability, flexibility in the workplace, and work and family balance.

Collectively our 50 partner companies, with annual net revenues of more than \$1 trillion, employ more than 4 million individuals throughout all 50 states.

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