

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 using flexible work practices to effectively respond to changing business demands while providing employees with more flexibility and control over their work schedules and their own quality of life.

Establishing flexible work arrangements with an hourly and nonexempt workforce can be challenging, yet there are many examples of how flexibility can be used creatively and effectively to achieve business results in a lower-wage work environment. Managers are key to building a flexible work environment. The following management guide, tips and tools will assist you in establishing flexible work arrangements that meet the changing needs and realities of your workforce and business requirements and effectively manage employees who are using flexible work arrangements to ensure success.

Benefits of Flexibility

Flexible ways of working can be used to enhance employee performance, engagement, and ability to meet or exceed business requirements. Business impacts of flexibility with 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, absenteeism and “call offs”* by providing options for expanded hours, coverage, and ability to take and 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 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 service* through satisfied, committed employees.

Tips for Creating a Flexible Work Environment

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

Formal flexible work arrangements 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, as well as 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 flexibility 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.).

- ✓ **Be open to considering formal flexible work arrangements** that might be feasible in your business and workgroup given the nature of work and explore other creative, flexible ways of working that could be used to meet job requirements and achieve business results. Although a company's support of flexibility is important, you as a manager play a key role in successful implementation.
 - Think outside the box. Customize and combine flexible work options to meet work requirements and provide employees with desirable work schedules.
 - Consider and explore how flexible ways of working can be used to enhance employee performance, engagement and ability to meet or exceed business requirements of your workgroup (coverage, extended hours, peak and valley staffing needs, customer service, production needs, etc).
 - Consider ways to enable employees to make occasional, unexpected changes in their work hours or take time off and make up the time without penalty.
 - Make sure you have enough trained resources in your staffing plan to ensure coverage for the ongoing and occasional flexible work arrangements in your workgroup.
 - Provide opportunities for employees to set schedules and make shift choices based on their preferences and provide employees with some control over and advance notice for required overtime.

- ✓ **Take the *Flexible Management Self-Assessment*** (in the Appendix) to reflect on your flexibility views and assumptions and gain insights about how to enhance your flexible management practices.
 - Be aware of your assumptions and those of others regarding the productivity of those working flexibly and/or off-site. Subtle comments and overt statements can undermine support of both formal and occasional flexibility.

- ✓ **Review your team staffing schedule and identify what flexible work arrangements are currently being used.**
 - What formal flexible work arrangements are in place? Are they effective in meeting employee needs and business requirements?
 - What, if any, flexible work practices are being used on an informal or occasional basis?
 - If you are not sure, you may have to ask team members to describe their use of flexibility and submit it to you.
 - Consider expanding the use of flexible work practices that are successful and involving the team in identifying other potential options.

- ✓ **Communicate to your workgroup why flexibility is important to the business** and provide an overview of your company's flexible work options. Highlight those that are applicable to your team and business requirements and explain how to access more information about the company's flexibility guidelines, request process and tools, if available.
- ✓ **Establish a consistent process for employees in your workgroup to request flexibility** and be clear about the business considerations and work requirements. Employees should develop a responsible business-based flexible work proposal and submit it to you for discussion and approval. (Employees should refer to the *Proposing a Flexible Work Arrangement Worksheet* in the Appendix of the *Guide for Implementing Flexibility with an Hourly and Nonexempt Workforce: Tips and Tools for Employees*).

An employee's flexible work arrangement proposal should include:

- Description of proposed flexible work arrangement:
 - Current schedule and desired/proposed schedule;
- Current job responsibilities and requirements and how the proposed flexible work arrangement will ensure job requirements are met;
- Potential challenges/effects of proposed arrangement and how employee will address them:
 - The team, co-workers and manager(s);
 - Customers/clients, both internal and external; and
 - Job/business/output and requirements; and
- Measures of success — how the flexible work arrangement will be monitored and evaluated.

- ✓ **Share best practices and acknowledge and publicize examples of employees who have successfully used flexibility.**
- ✓ **Walk the talk** — set clear expectations about business requirements, coverage and/or production needs, accessibility, etc., and then empower and trust your team to manage their work and schedules to meet business needs.
- ✓ **Conduct team meetings to establish team-based flexibility options.**
 - Use *Establishing Team-Based Flexibility: Discussion Guide for Managers* (in the Appendix) to guide and assist you in conducting meetings with your workgroup about how to use flexible work arrangements to increase team effectiveness.

Tips for Responding to Individual Requests for Flexibility

- ✓ **To ensure consistency and fairness, use the same request process and approval standards across all employees** to determine whether flexible work requests are viable in terms of enabling the employee to complete *all* job and work responsibilities.
 - Suggest employees follow the suggested flexible work arrangement proposal process (described previously) and use the tips and worksheet in the *Guide for Implementing Flexibility with an Hourly and Nonexempt Workforce: Tips and Tools for Employees*.

- ✓ **Carefully review the employee's proposed flexible work arrangement** if submitted to you as a written proposal or in a meeting and conversation with the employee. Don't automatically arrive at a yes or no response without careful consideration of the nature of the work and discussion of the following points:
 - What are the employee's current schedule and desired/proposed flexible work schedule?
 - What are the employee's current job responsibilities and work/business requirements, and how will the proposed flexible work arrangement ensure job requirements are met?
 - Does the employee clearly understand how the proposed flexible work arrangement will address his/her job requirements rather than primarily meet personal needs?
 - Is it clear that the proposed flexible work arrangement will not have a negative impact on the employee's job/work requirements and performance?
 - Is it possible that the proposed flexible work arrangement could enhance the employee's and team's ability to meet business needs (expanded coverage, improved customer/client service, greater productivity and effectiveness)?

- ✓ **Potential challenges of the proposed flexible work arrangement** and how the employee will address them:
 - What are potential challenges and/or impacts of the proposed flexible work arrangement on the team, co-workers and manager(s)? In an hourly/nonexempt environment, flexibility has to be managed within the context of the nature of the work and the team's ability to meet business and work requirements.
 - Will there be challenges or concerns with internal or external customers/clients?
 - What challenges would the proposed flexible work arrangement pose for meeting business requirements (coverage, production needs, and required output and service level targets, etc.)?
 - Are there costs associated with the proposed flexible work arrangement (equipment such as a computer, Internet connection, extra telephone line, etc.)?
 - Are there potential cost savings that might result from the flexible work arrangement (i.e., increased productivity, freeing up office space, etc.)?

✓ **Measures of success** — how the flexible work arrangement will be monitored and evaluated:

- How will you evaluate and measure the success of the flexible work arrangement in meeting job requirements, expectations and performance objectives (qualitative and/or quantitative measurement)?
- What review process and timeline will be used to assess the effectiveness of the flexible work arrangement? Be specific and adjust the timeline to align with changing business needs.
- What might be warning signs that the flexible work arrangement is not working well?

✓ **During your discussion with the employee, use good communication and collaborative problem-solving skills** and keep in mind these important points:

- Do not ask why a person is seeking a flexible work arrangement — decisions about working flexibly should be based on business needs and not personal reasons. If the employee provides the personal reason for their request:
 - Reflect your empathy and understanding.
 - Express your desire to develop a win/win solution.
 - Reinforce the importance of focusing on how the flexible work arrangement will ensure business needs are met.
- Discuss with the employee whether the proposed flexible work arrangement is the most appropriate one for both the employee and business requirements and consider others if appropriate.
- Acknowledge areas in which the employee has effectively addressed potential issues and challenges.
- Point out any concerns you have about how the flexible work arrangement might adversely impact the employee's ability to work productively and effectively or to meet all business requirements.
- In partnership with the employee, think of innovative and creative ways to ensure the required work gets done.
- If necessary, ask the employee to revise or modify his or her proposed flexible work arrangement to meet business needs.
- When evaluating performance, hold the employee to the same standard of accountability as you apply to others, not a higher one.

✓ **After reviewing individual flexible work arrangement requests, approve those that are viable.**

- Emphasize that changing business needs, co-workers' schedules and work demands may require modification of a flexible work arrangement and flexibility from them to ensure success.

✓ **Consider piloting flexible work arrangements** to determine if they will be effective in meeting business needs.

✓ **Collaboratively review any denied flexible work arrangement proposals with requesting employees** and clearly describe why the proposed flexible work arrangement will not work at this time, providing business reasons.

Tips for Establishing Team-Based Flexibility

Some of the most creative and effective uses of flexibility are being implemented at the workgroup/team level, particularly with an hourly and nonexempt workforce. When team members are engaged in the process of determining flexible ways of working to meet their needs while ensuring that business and work requirements are met, it's a win/win. Employees are more satisfied, engaged and effective, and the business may benefit from retaining key talent, expanding hours and ensuring coverage to meet customer/client and production needs, and reducing overtime costs.

✓ **Review your team staffing schedule and identify what flexible work arrangements are currently being used.**

- What formal flexible work arrangements are in place? Are they effective in meeting employee needs and business requirements?
- What, if any, occasional flexibility is being used?
- If you are not sure, you may have to ask team members to describe their use of flexibility and submit it to you.
- Consider expanding the use of flexible work practices that are successful and involving the team in identifying other potential options.

✓ **Conduct discussions with your workgroup** (refer to *Establishing Team-Based Flexibility — Discussion Guide for Managers* in the Appendix) to:

- Communicate why flexibility is important to the business and provide an overview of your company's flexible work options;
- Review flexible work arrangements that are being used and are applicable to your team and business requirements. Explain how to access more information about the company's flexibility guidelines, request process and tools, and the process for requesting flexibility;
- Solicit ideas for other desired flexible work options and determine viable flexible work arrangement given the nature of the work and business requirements;
- Discuss potential challenges and critical success factors of the flexible work arrangements being considered; and
- Establish a flexibility plan for the team, including staffing and coverage requirements and performance standards and expectations.

✓ **After providing clear work parameters to team members, encourage them to work as a team** to structure their flexible work arrangements and provide backup coverage for each other to ensure customer service and production requirements are met.

Tips for Effectively Managing Flexibility Day to Day

Once you've made a commitment to using flexible ways of working to achieve business results and established the groundwork for effective implementation of flexible work options within the context of the work requirements and needs of your hourly and nonexempt workforce, ongoing commitment and flexible management skills will be needed to ensure success. The following tips and strategies for success are based on best practices and success factors from organizations with an hourly or nonexempt workforce that are effectively using flexibility as a management and business tool.

- ✓ **Use flexibility as a tool to achieve business results**, not a “one off” personal accommodation, entitlement or “perk.”
 - Keep an open mind and proactively collaborate with employees to find flexible and innovative ways of working that achieve business goals. Employee commitment, engagement and effectiveness will likely rise as a result.
 - Break jobs down into components to determine whether flexibility is feasible for one of the components and consider combining different kinds of flexible work options to ensure coverage and meet work demands.
- ✓ **Ensure consistency and fairness.** Whatever flexible work arrangement request and decisionmaking process you use, apply it consistently and equitably.
 - Make sure everyone is clear about the work requirements; expectations; and flexible work policies, procedures and guidelines and enforce the rules to ensure fairness and equity.
 - Emphasize that successful flexibility requires mutual “give and take” and reciprocity and that if previously approved flexibility is not working, it will need to be recalibrated.
- ✓ **Build flexibility into staffing models** to respond to changing business needs, maintain productivity and avoid costs of unscheduled absences.
 - Analyze the work flow, coverage needs, peaks and valleys of business requirements.
 - Cross train staff to serve as “floaters” to fill gaps and provide coverage for employees who have requested time off.
- ✓ **Engage employees in developing team-based flexibility solutions** that meet business and personal needs.
 - Enlist the experience and thinking of employees as you try to find flexible work strategies.
 - Solicit team ideas, build consensus and support, and gain commitment to meeting business goals and ownership of the flexible work solutions.
- ✓ **Build a climate of trust, empowerment and accountability.** Encourage and expect employees to develop viable work solutions to meet business requirements, resolve issues and draw on managers as resources and for final approval.
 - Provide employees with clear expectations and the information and tools to do their job, then empower and trust employees to deliver the required results.

✓ **Measure performance by results**, and hold employees accountable for meeting job and business requirements.

- Set mutually agreed upon concrete performance objectives with all your employees, whether or not they use some type of flexibility.

✓ **Use effective communication skills and methods** to foster high performance.

- Post weekly and daily schedules, coverage requirements, team goals and deadlines using online tools or in strategic locations to ensure all staff is informed about expectations and staff availability.
- Ask employees to keep one another and the manager informed through available and appropriate methods including e-mail, instant messaging and phone messages to convey updates on deadlines, resolve customer issues, etc.

✓ **Manage flexibility in ways that provide developmental opportunities so careers continue to advance.**

- When considering employees for assignments and developmental opportunities, remember those people on flexible work arrangements — out of sight should not mean out of mind.
- Interact with employees at key decision points in the employment cycle and as part of performance discussions to explore how flexible work options can help employees achieve their long-term career and personal goals.

✓ **Schedule meetings and trainings at times when everyone can attend.**

- Consider the establishment of core working hours during which all team members are accessible for meetings and designated days during which no meetings will take place.
- When convening last-minute or impromptu meetings, be mindful of including by telephone those employees who are working off-site. If you feel the need to call a last-minute meeting, ask yourself before calling the meeting:
 - Does this meeting really need to take place immediately or could it wait until tomorrow/ some other day?
 - What am I hoping to accomplish? Is there another way to achieve the goal (individual conversations, cascading communications, e-mail, etc.)?
 - Are all the employees I'm inviting to attend really required?
 - Is the agenda well planned with clear desired outcomes?
 - Have I disseminated all the required materials?

✓ **Assess the need for your team members to routinely check voice mail and e-mail** during work hours and times that they are not scheduled to work, if appropriate.

- Establish team guidelines for what's appropriate and how to connect should an emergency arise.
- Set ground rules for maintaining coverage, accessibility, responsiveness and connections established with the team.
- Develop a team backup plan for unexpected requests, assuring coverage during normal business hours.

Appendix

Flexible Management Self-Assessment

Establishing Team-Based Flexibility: Discussion Guide for Managers

Manager Discussion Guide: Meeting Outlines

Tips for Managing a Dispersed Team

Share:    

For more resources, go to www.corporatevoices.org/publications/workplaceflex

Flexible Management Self-Assessment

Assessing Your Flexible Management Views And Practices

To effectively manage employees in a flexible work environment, it is important to base your actions and decisions on real information versus impressions, assumptions or fears. To gauge your views on flexibility, answer the following questions and see where you fall on the flexible management scale. This self-reflection should provide you with guidance about how you might enhance your flexible management practices.

Instructions: Place a ✓ in the appropriate box.

Question	Always	Often	Sometimes	Rarely	Never
How often do ...					
1. Your employees feel that you manage in ways that ensure success in meeting employee and business needs?					
2. You evaluate employees' performance by measuring their results and not only by how much time they spend in the office?					
3. You emphasize planning and efficiency in your work team?					
4. You intentionally manage team communication to optimize information exchange, planning, etc.?					
5. You promote cross training of employees to allow for backup coverage and development opportunities?					
6. Your employees perceive you using flexible ways of working to achieve business goals and results?					
Do you think ...					
7. Flexibility means more work for the manager?					
8. A request for flexibility indicates that the requesting employee is not as committed to her/his job or the work requirements of the team?					
9. The results people produce, not their presence in the office, are what are important to achieving business goals?					
10. Team members should have the opportunity to develop solutions as a team when scheduling issues arise?					

Flexible Management Self-Assessment

Scoring Sheet

Instructions:

- 1) Circle the numbers in the boxes below that correlate to the checked boxes on your questionnaire.
- 2) Add all the numbers in each vertical column and place the totals in the correlating total lines.
- 3) Add the total lines for each set of questions horizontally, placing these totals in the “Score” box to the right of the total line. These are your final scores. You can find the interpretation of your scores on the accompanying key.

Question	Always	Often	Sometimes	Rarely	Never	
How often do ...						
1. Your employees feel that you manage in ways that ensure success in meeting employee and business needs?	4	3	2	1	0	
2. You evaluate employees’ performance by measuring their results and not only by how much time they spend in the office?	4	3	2	1	0	
3. You emphasize planning and efficiency in your work team?	4	3	2	1	0	
4. You intentionally manage team communication to optimize information exchange, planning, etc.?	4	3	2	1	0	
5. You promote cross training of employees to allow for backup coverage and development opportunities?	4	3	2	1	0	
6. Your employees perceive you using flexible ways of working to achieve business goals and results?	4	3	2	1	0	
Totals for Questions 1–6:						
						SCORE:

Do you think ...						
7. Flexibility means more work for the manager?	0	1	2	3	4	
8. A request for flexibility indicates that the requesting employee is not as committed to her/his job or the work requirements of the team?	0	1	2	3	4	
9. The results people produce, not their presence in the office, are what are important to achieving business goals?	4	3	2	1	0	
10. Team members should have the opportunity to develop solutions as a team when scheduling issues arise?	4	3	2	1	0	
Totals for Questions 7–10:						
						SCORE:

Flexible Management Self-Assessment

Scoring Key

I. Questions 1–6:

- *A score between 18 and 24 indicates:*
 - Your employees most likely see you as open to and supportive of their needs as people who have lives outside of work.
 - You probably do not use “face time” or working a traditional schedule as a tool for measuring performance.
 - You are generally organized and like to think and plan ahead to anticipate all aspects of team functioning and performance, including scheduling. You are comfortable concretely addressing intangibles such as communication.
 - You probably see — or are well on your way to seeing — both short- and long-term flexibility as another way to approach the work and produce results.

Hint: Check back with your employees to verify the accuracy of your perceptions about yourself and ask if there is any room for improvement.

- *A score between 12 and 17 indicates:*
 - Although your employees generally see you as open to their needs as people, you might not always be viewed as “supportive.” It could be that less assertive employees are not approaching you to discuss their issues. This could mean that, if experiencing work-life conflicts, they feel their options are limited to living with the status quo or leaving.
 - You may rely on non-results-based measuring sticks for employee performance such as “face time.” It might be important to heighten your awareness of whether you are prone to managing by this “default” position. For sure, face time and flexibility don’t mix.
- *A score between 0 and 11 indicates:*
 - It is likely that your employees do not see you as particularly open to or supportive of their out-of-work responsibilities. Research shows that the potential losses to you as a manager may include loss of employee loyalty and commitment, which can in turn negatively affect employee contributions, creativity, initiative, motivation and productivity.
 - You may be defaulting to measuring your employees by their “face time” in the office rather than real results. This may leave you open to decreased employee morale and teamwork.
 - Do you feel that you spend too much of your time putting out fires and trying to manage misunderstandings? You may feel that you never have enough time to accomplish all you intended to do. Deliberate planning and delegation will help to reduce this problem.

II. Questions 7–10:

- *A score between 12 and 16 indicates:*
 - Your perceptions of flexibility are in line with the research: When well implemented, flexibility can mean less work for the manager and enable the best performers to produce quality output while not being artificially bound by schedules and locations that are not related to achievement of results.
 - You are business and results focused; you less often tend to monitor or control your employees. You likely trust them and consider them to be accountable for achieving business results.
 - Your management attitude conveys an interest in getting the job done and in being open to new ways to accomplish this. You are open to different ways to approach both business problems and the people who work with you to solve them.

Note: You seem to be doing everything right. Just be sure that you are consistent across employees and in different situations, particularly those that are stressful. Asking for feedback on a regular basis can keep you honest and your employees committed.

- *A score between 8 and 11 indicates:*
 - Although you are open to flexibility for your employees and that will work with them to determine what is viable, you still tend toward some paradigms that conflict with a culture of flexibility. If these attitudes enter your thinking process while you are considering employee requests for flexibility, you may base decisions on preconceived notions you hold about flexibility and employees who work flexibly, not on the business needs.
 - Possibly, you are not always sure you can trust your employees to be accountable for achieving results. You may think some (many?) people need to work a traditional schedule and/or work in the office to be effective. In your heart you feel that employees, left to their own devices in the unstructured environment of home, might not always attend to their responsibilities as diligently as when in the office.
 - It is important to take an inventory of your opinions about flexibility and employees who request/use them. If needed, find a sounding board in your HR department to help you determine which of your opinions are based on fact, which are based on myths and how you can change your behaviors to only respond to facts.
- *A score between 0 and 7 indicates:*
 - You may hold a number of paradigms that say that to ensure coverage and meet business requirements, flexible work arrangements won't work in an hourly, nonexempt environment.
 - You may tend to manage people more by sight than by actual results. Research indicates that by doing this, the performance of some of your best employees will be diminished. If you continue to measure by presence, not results, you may start to lose some of the skilled employees who have become marginalized in the process.
 - Consulting with other managers about their experiences and how they deal with the same situations can go a long way in helping you determine which paradigms you should hold on to and which you can drop with neutral or positive consequences for the business.

Establishing Team-Based Flexibility: Discussion Guide for Managers

Some of the most creative and effective uses of flexibility are being implemented at the workgroup/team level. 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. Employees are more satisfied, engaged and effective and the business may benefit by retaining key talent, expanding hours, ensuring coverage to meet customer and production needs, and reducing overtime costs.

The following discussion guide is designed to assist managers in leading meaningful discussions with their workgroups (both on-site workers and teleworkers/remote workers) about how to use flexible work practices to increase team effectiveness. Many organizations have formal flexible work option policies and guidelines in place, while others do not. In either case, not all flexible work options will be relevant given business demands in an hourly and nonexempt work environment. It's up to you as a manager, with input from the team, to determine flexible work options that are feasible in meeting business requirements.

In your team meetings and discussions, team members can explore flexible work options that are desirable and realistic given business requirements, determine critical success factors, discuss how to address challenges, and establish team operating principles or agreements to ensure success. Discussions with team members can be conducted as part of regular team/staff meetings or in three or four designated meetings convened for this specific purpose. Managers may pick and choose the most relevant segments for their team.

Prior to the first meeting:

- **Review company flexibility options, policies and guidelines, if available.**

- Which flexible work options are applicable to the business function and workgroup?

Potential formal flexible work arrangements include:

- *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 flexibility 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.).
- **Review the team staffing schedule, identify what flexible work options are currently being used and be prepared to share this with the workgroup.**
 - What formal flexible work arrangements are in place? Are they effective in meeting employee needs and business requirements?
 - What, if any, occasional flexibility is being used?
 - If you are not sure, you may have to ask team members to describe their use of flexibility options and submit these to you prior to the meeting.
 - **Think about how flexible ways of working can be used to enhance employee performance, engagement, and ability to meet or exceed business requirements of your workgroup.** Business impacts of flexibility often 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, absenteeism and “call offs”* by providing options for expanded hours, coverage and ability to take and 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 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 service* through satisfied, committed employees.

Manager Discussion Guide: Meeting Outlines

Flexibility Team Meeting Discussion Topics

Each topic or segment can be covered in a 60–90 minute meeting.

I – Flexibility as a tool to meet employee needs and business requirements:

- Business requirements and metrics
- Current and desired use of flexibility
- Ideas for more flexible ways of working

II – Flexibility challenges and success factors:

- Viable flexible work options in workgroup
- Potential challenges
- Critical success factors

III – Establishing a flexibility plan for the team:

- Ensuring staffing and coverage requirements
- Maintaining high performance
- Establishing team agreements and operating principles

Meeting One – Flexibility as a Tool To Meet Employee Needs and Business Requirements

- **Explain** your objective for these flexibility discussions with the workgroup.
 - **Reiterate** the overall business strategy, goals and the output and/or performance metrics from this workgroup that are required to meet the company’s business objectives.
 - **Describe** positive impacts of flexible ways of working for the business and your team based on the business impact of current flexible work arrangements and other potential flexible work options.
 - **Ask** team members for their view of how flexible work arrangements benefit the business and their ability to meet team work requirements. Record on a flip chart.
- **Review** the company’s flexibility policy and approach and the flexible work options that are applicable to your workgroup (if they exist).
 - **Describe** the current flexible work options that are in place and being used by team members, both formal flexible work arrangements and occasional use of flexibility.
 - **Ask** how these flexibility options are working to meet individual and business needs — facilitate discussion.

- **Ask** team members to identify other ideas they have for flexible ways of working that would meet their needs as well as the needs of the business.
 - **Be creative** and think “out of the box.” Record ideas on a flip chart.
- **Ask** team members to narrow down their preferences from the potential flexibility options to the ones that are most viable given the nature of the work and business requirements (if necessary).
- **Agree** to consideration of the preferred and most viable flexible work options and set a time for the next meeting.

Note: Manager may want to review the preferred and suggested flexible work options and be prepared to recommend the options that are realistic and viable given the team’s business requirements, schedule and needs for coverage.

Meeting Two — Flexibility Challenges and Success Factors

- **Open** the meeting with a brief review of the discussion and agreements from the previous meeting.
- **Describe** the preferred flexible work options identified by the team and what you consider the most viable options given business requirements of the workgroup.
 - **Explain** your rationale and answer questions as necessary.
 - **Discuss** how these flexible work options might work given the team schedule, work requirements and coverage needs.
- **Identify** potential challenges and concerns.
 - **Ask** team members what concerns they have and challenges they see in using these options for more flexible ways of working and meeting business requirements. Record on a flip chart.
 - **Engage** team members in a discussion of how they might overcome these challenges and concerns to ensure coverage and meet business needs.
 - **Encourage** honest input and discussion.
- **Identify** critical success factors to ensure the success of working flexibly (both on-site and off-site) and meeting business needs.
 - **Ask** for concrete ideas and ways to ensure success. Record on a flip chart.
- **Agree** to consideration of these challenges, potential solutions and success factors in establishing a process to request and approve flexible work options that will ensure meeting business and coverage requirements.

Note: Before the next meeting the manager should determine how team members can request flexible work options and address business and staffing/coverage considerations.

Meeting Three — Establishing a Flexibility Plan for the Team

- **Open** the meeting by reviewing the team’s discussion in the previous meeting regarding flexible work options being considered, potential challenges and solutions and critical success factors.
 - **Pre-record** key points on a flip chart to review with the workgroup.
- **Review** the process you propose to request flexible work arrangements and the key considerations to ensure staffing, coverage and business requirements.
 - **Facilitate** discussion to solicit feedback, answer questions and address concerns.
 - **Discuss** a timeframe for implementing these flexible work arrangements as a pilot and evaluating success.
- **Determine** what maintaining high performance will look or feel like when the workgroup is using new/expanded flexible work options.
 - **Ask** workgroup to identify the characteristics of “high performance” based on the workgroup’s coverage and business requirements.
 - **Record** on a flip chart and compare to the list of success factors developed earlier.
- **Establish** team agreements and operating principles to ensure success. Record on a flip chart.
 - **Establish** core hours, schedule and boundaries for coverage and accessibility as appropriate for your work environment and business demands.
 - Agree on hours and days that team members need to ensure coverage.
 - Should a team calendar and contact numbers be created or posted?
 - How does the team ensure consistency and fairness in use of flexible work arrangements?
 - **Determine** how to ensure effective, frequent and ongoing team communication.
 - **Determine** frequency of updating voice mail greetings and checking and responding to e-mail and voice mail if applicable.
 - **Discuss** how to respond to and handle unexpected events or “emergencies.”
Ask team members:
 - What types of unexpected situations or emergencies might come up?
 - How might these situations be handled? Develop a plan.
 - **Determine** opportunities for cross training and leveraging resources to cover those on flexible work arrangements.
 - **Determine** schedule of team meetings — will it need to change? Will meetings be face-to-face or can teleworkers/remote workers participate by phone?
 - **Discuss** how to ensure that the valuable “informal” interactions and team building that typically happen in the office (water cooler conversations) can be recreated when employees are working off-site and/or on different schedules.

- **Agree** on how to hold each other accountable to these agreements.
 - **Determine** how the agreements will be finalized, documented and distributed to the team.
 - **Establish** a plan to monitor and evaluate success of the flexible work arrangement implementation.

Tips for Managing a Dispersed Team

Telework is one of the fastest-growing flexible work arrangements for hourly and nonexempt employees, particularly for administrative assistants and customer service representatives. In some cases, employees are hired as home-based employees. Therefore, managers are increasingly faced with managing dispersed teams of employees, some of whom work in the office, some of whom work off-site occasionally or on a regular basis (teleworkers) and some of whom are remote workers, rarely working at a company office.

The following principles represent the essence of what it takes to be successful managing at a distance. If you follow these principles, you are on the right path toward being an effective manager of dispersed teams.

Develop and Maintain Strong Relationships

The most important key to successful distance management is relationship building. As with any relationship, building distance relationships requires time. The ability to build successful relationships enables the other key principles. It makes the manager approachable with questions and concerns, creates real understanding of the manager's and each employee's unique needs and requirements, and establishes the level of trust to be able to communicate directly with employees' internal and external customers if necessary.

Build Trust and Ensure Reliability

Trust is about reliability and confidence in a relationship between two people. It is about believing you can give up control and expect a certain outcome, of a particular quality, at a designated time. Knowledge work is often invisible and frequently uncertain, so we need to embrace performance management systems that clearly communicate goals and intention and use technology, if available, to measure required output. Without trust and ways of ensuring reliability, telework/remote work will fail.

Communicate Effectively and Frequently

Check in frequently with both the full team and each individual member, and ensure that the members of your team are proactive in checking in with you. This requires two things: you must be approachable and accessible to them. Managers who are approachable tend to ask many open-ended questions that are aimed at finding out the employee's point of view rather than getting their own across. These managers spend significantly more time listening than talking and have built a strong professional relationship with the employee.

Intentional, planned communication is critical to managing dispersed teams. Determine when to use different communication vehicles to achieve your desired objective, including teleconferences, e-mail, voice mail and face-to-face meetings. Remember that face-to-face has its place. Face-to-face contact is extremely valuable in three situations: kicking off a team effort to jumpstart the relationship-building process, maintaining the relationship at a high level, and expressing negative emotions, such as feedback about poor performance. Though time-consuming and sometimes expensive, face-to-face meetings in these situations typically have a high payback.

Ensure Accessibility and Responsiveness

Accessible managers schedule frequent check-in times and then let nothing get in the way of keeping those times. They also may give out home and cell phone numbers and let employees know what times are off limits for phone calls. It is easy for things to be left unsaid when you are only getting together by electronic means.

Make Expectations Clear — Manage for Results

Distance work relationships between the manager and team members most often go awry when the team members are not clear about the expectations of the manager and other team members. Expectations can be about needs for coverage, accessibility, checking in, changing work demands, and roles and responsibilities. It is critical for workers to understand the context and overall purpose of the work they are doing; precise outcomes they are expected to deliver; specific activities they will undertake to achieve each outcome; milestones, including check-in times and due dates; and the amount of time each activity is expected to take. Then, it is easier to manage by results, which is the key to managing performance of teleworkers. Document everything you want done. Every meeting should be followed up with a statement of the actions agreed to, identification of the individual with lead responsibility for each action and due dates. Be sure to document all agreements that have been made between the manager and individual workers or among team members.

Customers (Internal and External) Make the Best Judges

The best judge of an employee's work may be the internal or external customer. You need to build relationships with the customers if you want open and honest feedback. It is often easier for the customer to give negative feedback to you than to the person who produced the work product. As the manager, it is your responsibility to deliver the feedback to your team members. Be sure you've gotten concrete examples of problem behaviors from your customers and be prepared to hear your team member's side of the story before you work together to establish a plan for change.

Distance Magnifies Management Mistakes

Effective distance management requires a solid understanding of management basics. Distance managers must be masters at such competencies as setting expectations, planning, delegating, giving feedback and managing time. They also must be highly disciplined about following through on commitments and extremely good communicators.

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