How 20 Leading Companies Are Making Flexibility Work

BOSTON COLLEGE CENTER FOR WORK & FAMILY

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Project Purpose and Overview

Since 1990, the Boston College Center for Work & Family has been working with human resource directors and other organizational leaders around a shared interest in creating effective workplaces where employees feel successful in their work and their nonwork lives. Over that time, numerous programs, policies, and initiatives for flexible work arrangements (FWAs) have been rolled out with much fanfare and optimism. Indeed, many benefits accrued for organizations at the forefront of this movement, such as improved recruiting and retention, and employee engagement and satisfaction. For a while, it looked as if the utilization rate of these policies was increasing year by year.

Recently, however, the use of these policies has stabilized or even declined (Golden, 2001). From academic and corporate research, as well as from the popular press, we have learned that these flexible work arrangement programs are available but not widely used, some would say, not *usable*. For these and other reasons, there is much unevenness in the extent to which these flexibility programs are meeting the needs of employees or businesses. **It has been suggested that there are missing links in the process between setting up a program for working flexibly and making it work, which Lewis and Haas (2005) have labeled the "implementation gap" (p. 350).**

This report represents what we hope will be the first of many efforts to fill that gap. Rather than focusing on why these programs are not working to the desired extent, our focus is on what makes some of these programs very successful. Here we present in detail an array of exemplary programs from leading companies along with insights, recommendations, and strategies believed to be responsible for their success.

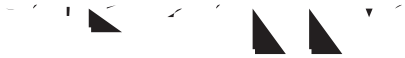
To find these exemplars, we contacted representatives of 20 companies, most of whom are members of the Boston College Center for Work & Family National Roundtable. We asked each representative if they had one or more programs for working flexibly that they deemed to be highly successful, i.e., "worth bragging about," a program that worked well for the employee and the business. We interviewed one person in each company who was knowledgeable or responsible for the FWA program (usually an HR manager or representative), one employee who was currently using the program, and one manager of an employee currently using the program. In total, we conducted 58 interviews and gathered detailed information about the process of carrying out a variety of programs and approaches to making flexibility work. In addition to the interviews, we conducted a review of both practitioner and academic research related to flexibility in the workplace and in the lives of workers.

List of Participating Companies

Company	Topic
Alcatel-Lucent	Part-Time Work
American Airlines	BOLD Initiative
AstraZeneca	New Approach for Flexible Work Arrangements
Baxter	Alternative Work Arrangements Proposal Kit
Best Buy & CultureRx	Results-Only Work Environment (ROWE)
Booz Allen	Teleworking
Dell	Virtual Call Centers
Deloitte & Touche USA LLP	Personal Pursuits Program
Eli Lilly & Company	Teleworking
First Horizon	Prime-Time Schedule
GlaxoSmithKline	Part-Time Sales Force
Hewlett-Packard	Teleworking and Job Sharing
Intel	New Parent Reintegration
International Business Machines	IBM Flexible Work Options–New Communications Strategy
KPMG	Reduced Workload Model
MITRE	Phased Retirement
PriceWaterhouse-Coopers LLP	FWA Database
Raytheon	9/80 Work Schedule
Takeda Pharmaceuticals	Work Paths
TAP Pharmaceuticals	Job Sharing for Field Sales Representatives

Intended Audience

Our hope is that this report will be of value to a wide audience, as our findings include not only detailed reviews of specific types of flexible work arrangements, but also insights as to what made them particularly successful. It is especially intended as a reference tool for work-life professionals, and others charged with implementing flexible work arrangements in their companies. The Executive Summary and selected other portions of the report may also be used by leaders and managers in anticipating obstacles that they may face in developing new ways of working. The report may also be useful to senior managers, employees, and academics. The report can be useful in its entirety or by referring to one or more of its many parts noted above.



Project Purpose and Overview

What Did Our Representatives Say about the Implementation Gap?

Based on our analysis, the resistance of organizational cultures to change is surely a major factor in the implementation gap. Our respondents told us that their organizations, while progressive in many respects, were slow to embrace the new ways of working. Cultural issues were evident in several of the obstacles that were commonly identified by our respondents: management resistance, employee skepticism and fear, and cultural resistance to major change. Our respondents had some useful insights and suggestions for overcoming these obstacles.

Management resistance	• Find a champion who is really committed to the initiative and will provide overall support. • Understand managers' fears. Many will be unwarranted and easily addressed. • Provide training that includes the business case and best practices. • Use scenarios to explore how things will work and how issues can be addressed. • Encourage the use of outcome-based performance goals rather than face time. • Give managers discretion in the use of these programs and use techniques to convince them of their value. • Empower employees to exert influence on their managers. • Point out that it's a two-way street–managers and employees both need to be flexible–it needs to be a win-win.
Employee skepticism and fear	• Provide examples of success stories. • Make it clear that flexibility is not "one-size-fits-all." Provide guidance but allow the employees to work out their particular needs with their managers. • Make the program "reason-free," a choice for any personal goal. • Champions can be helpful with this obstacle as well by showing visible high-level management support.
Cultural resistance to major change	• For major cultural changes such as ROWE, people's core beliefs and behaviors need to change. They need to think in a different way. • It can be a very difficult change for people that will take many months or even years. • The core problem is not just "trust," but the industrial work model.

One employee had a very good suggestion that was echoed by several others who we interviewed:

> *It needs to work both ways. Managers and companies need to be flexible in allowing part-time work, and employees need to be flexible to meet whatever requirements that the company has. If this condition is met, then the arrangement should be beneficial for both the manager and the employee. Employees need to say to their managers, "If you get in a bind, I will be there for you." That will relax the manager and alleviate their nervousness that they may give you something to do and you will not be able to get it done.*

In sum, on the basis of our conversations with human resource representatives, managers, and employees, the successful implementation of flexibility is strongly driven by the company's culture. When the culture is supportive of these initiatives, they are usually successful. When the culture is not supportive of these initiatives, they rarely succeed.

Changing a company's culture generally takes a lot of time and patience. One manager explained that over time its program evolved into a new culture, and "it's just the way it works now. But if you think about it, we've been working on it 15 formal years."

How 20 Leading Companies Are Making Flexibility Work

The company representatives with whom we spoke generously provided us with their own thoughts about what made their programs both available and usable. There were commonalities among these recommendations that we have summarized into five categories. They include:

- Recommendations for research to be conducted before implementing flexible work arrangements
- Strategies for gaining commitment for the program
- Tips for effective design processes
- Methods for implementation of the program
- Suggestions for monitoring the program, making necessary adjustments

There is some research that should be conducted before getting the program going. This information gathering should include the following:

- Conduct research to understand employees' needs and what flexible work arrangements can best meet those needs.
- Analyze the organizational culture and the level of supportiveness for the desired FWA.
- Identify obstacles that may occur and determine how to overcome them.
- Identify potential downsides to the flexible work arrangements being considered and think about ways to mitigate them.

This step is probably the most critical and one where organizational culture needs to be well understood. Nearly all of the company representatives we studied indicated that support of top management was crucial to the success of the FWA program. They also told us that leadership support will only occur if the business case for the change is clear and compelling. Findings

Our respondents all noted the amount of forethought, planning, and support secured from other units within the organizations required for successful implementation. They mentioned the importance of **getting support from Information Technology and other departments**, developing management models, **providing training for managers and employees**, and developing comprehensive and well-organized **communication strategies** with consistent messaging for effective programs.

. Almost all of our respondents acknowledged the importance of monitoring the success of the program, but noted the **difficulty of measuring the impact**. Companies typically had means for measuring program utilization and employee satisfaction with overall work-life efforts, but had difficulty pointing to particular productivity, retention, or recruiting gains. A few of the companies were able to track results of particular work groups that had implemented flexible work arrangements, and the results were positive. Perhaps this element of successful implementation is the area where most improvement is needed.

What Are Examples of Successful Implementations?

As mentioned above, we asked our respondents to provide detailed descriptions of the programs they felt have been successfully implemented. We also asked about the obstacles they needed to overcome and the factors that made the programs successful. The information in these detailed descriptions has been greatly compacted and included in the reference chart on the following pages. The programs in the chart are organized in the same order as the full report, by type of program. Additional information is provided in the section of the full report entitled *Exemplars of Successful Implementations: 20 Model Programs*. Especially interesting are the managers' and the employees' comments regarding their involvement with the new ways of working.

Why Go to Such Lengths?

Flexibility is a new business imperative. Our 58 respondents told us that it is possible to offer excellent flexible work arrangements for employees and be more successful as a business. They said that it is especially important today to offer flexibility of all kinds and make these new ways of working stick.

Conclusion

The enthusiasm conveyed by our 58 interviewees has confirmed our belief that flexible work arrangements are an integral tool for effective workforce management. The successful implementation of these programs requires a supportive organizational culture, human resource policies and programs, and individual employees to be aligned in their pursuit to promote a prosperous business while also enabling employees to have meaningful lives. The [illegible], published by the Boston College Center for Work & Family in 2007, asserts that these three forces working in synergy are the key to organizational effectiveness.

	Company	Program	Description	Benefits
PART-TIME AND REDUCED WORKLOAD	First Horizon National Corporation	Prime-Time Schedule	Employees in some situations can reduce hours to 20 or more and maintain benefits	Strengthened company culture, more loyal, productive employees, happier customers
	KPMG	Reduced Workload Model	Provides a model for reducing workload when typical week is >40 hours	Employee retention, teamwork, reduced resentment, client satisfaction from better continuity of service
	Alcatel-Lucent	Part-Time Work	Employees can reduce their hours to less than full-time when approved by manager	Improved productivity, reduced absenteeism, ability to adjust work-loads
	GlaxoSmithKline	Part-Time Sales Force	Generally 25 hours/week calling on physicians	Effective sales force at lower cost than full-time sales force
JOB-SHARING	TAP Pharmaceutical Products, Inc.	Field Job Sharing	Two employees share one regular full-time sales rep. position	Recruiting and retention; built-in backup when one employee is out
	Hewlett-Packard Company	Job-sharing / Teleworking	Two employees share one position/employee works from home full-time	Attraction and retention; makes company more competitive; happier, more productive employees
TELEWORKING	Booz Allen Hamilton	Teleworking	Employees work at a location other than their official office– full-time, part-time, or part day	More productive staff; enables work across time zones; helps environment (reduces commuting)

Drivers	Obstacles	Success Factors	Recommendations
Company identified links from flexibility to employee retention to customer loyalty			
Consulting environment where part-time as % of 40 hours was not fair to full-time workers			
Originally implemented at AT&T to help recruit telephone operators			
Attract qualified people to reach physician market effectively and cost-efficiently			
Wanted to retain a higher % of workers starting families			
Help employees meet their lifestyle needs while still meeting business objectives			
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Employee survey showed workforce was becoming nontraditional; CEO led initiative	Supervisors did not believe they could manage people remotely; IT not set up for this	
Benchmarking by execs showed potential cost and productivity gains	Management resistance; getting right technology; culture acceptance	
Recoup investment in people; will become harder to recruit people in next generation	Gaining access to the intranet for people who	
Retention surveys of women indicated difficulty in returning full-time after leave		
Employees requested it and the company found it could be easily implemented		
Company president initiated this to help recruitment and retention		
Company needed both improved productivity and a new way of functioning		

	Company	Program	Description	Benefits	
LINKED BUSINESS RESULTS AND FLEXIBILITY	CultureRx & Best Buy	Results-Only Work Environment	Enables people to work whenever and wherever they want, as long as they get the work done	Improved business results, reduced turnover, talent magnet, culture more effective, company image	
IMPLEMENTATION OF FLEXIBLE WORK ARRANGEMENTS	Takeda Pharmaceuticals	Work Paths	Broad FWA program includes telecommuting, job-sharing, part-time	Employee satisfaction, improved morale and commitment, employee retention	
	Baxter Healthcare Corporation	Alternative Work Arrangements Proposal Kit	Tool that supports requests for flexible work arrangements plus broad FWA program	Attraction, retention, employee satisfaction, productivity gains	
	Pricewaterhouse Coopers LLP	FWA Database	A standardized database and single process to administer a broad range of flexible work arrangements	Recruitment and retention; lower turnover improves company performance	
	IBM Corporation	IBM Flexible Work Options – New Communications Strategy	Broad program includes compressed workweek, flex hours, telecommuting, part-time, leave of absence	Embeds a sense of trust, fairness, and equity into the employees	
	AstraZeneca Pharmaceuticals	New Approach for Flexible Work Arrangements	Broad FWA program including flextime, part-time, job-share, telework, and flex Fridays/compressed workweek	Improves employee engagement; attract and retain diverse talent; provide advancement opportunities for women	

	Drivers	Obstacles	Success Factors	Recommendations
	Research indicated that traditional flex programs were not being fully utilized; wanted to be differentiated	People's core behaviors/beliefs need to change for it to be successful; management resistance	Employee courage and persistence; strong support and facilitation; use of "pull" approach to gain support	Start from a foundation of trust; be open to new ideas; include everyone; change language
	Relatively new company wanted to establish important company values	Management resistance, lack of trust, managing by face time, poor prior experience with flex work	Manager training, organizational commitment	Establish leadership commitment up front, provide needed training, be consistent, and administer fairly
	Teleworking driven by Clean Air Act, global work needs, and technology progress	"Line-of-sight" management; shortage of resources for training and communication	CFO champion; including FWA in job posting system; high-level managers as role models	Know organization and what can be tolerated; take it one step at a time
	Company merger led to inconsistencies and a consultant recommended this approach	Technical difficulties, learning curve, and overwork	Leadership support starting with the senior partner and U.S. chairman	Foster an environment of flexibility; show senior leaders this is important to the business
	Changing work environment; happier employees are more productive; women's council needs	Competition for "air time" with employees and managers	Management buy-in; commitment to creating a supportive, flexible work environment	Provide education and regular communication that increases managers' comfort in using these programs
	FWA seen as an important tool for facilitating a company merger; customer diversity requires more employee diversity	Many management jobs require long hours and lots of travel; managers worry that FWA will reduce productivity	Senior people are fairly strong advocates; FWA are an important part of the culture	Position work-life with other groups to gain strength; take a business and cultural view that is broader than a particular program

RESEARCH

Closer to home, our respondents talked about the impact of mergers and acquisitions in the United States. The challenge in these instances is to pull the sometimes quite different cultures of two companies together. Such organizational turbulence requires forethought and action that, in the ideal world, retains the best elements of each organization, and develops strategies for creating a new culture that is responsive to the new and more diverse employee base. Such activity in the time-starved business world of today is in itself another challenge.

A representative of one organization among our leading companies mentioned changing government regulations that affect the daily conduct of business. This organizational representative referred to the Clean Air Act that requires a reduction in the number of cars in employee parking lots. How does an organization affect the personal choices that employees make regarding travel to and from work? Although not mentioned by our respondents, there are a host of other governmental interventions affecting the business climate today, including the Family and Medical Leave Act (FMLA), the

lot of women leaving the workforce to raise their families." The challenge was to find the right people with the right skills who would benefit from having the job and do a good job for the company at the

measures are typically proprietary, although the results are often published in newsletters such as *Work Family Connection* and reports (such as the Corporate Voices report, 2005).

The second source is academic research, which is primarily conducted with working family members, all of whom work in different settings. Reports and journal articles derived from such data are publicly available, but typically read only by academics.

The core mission of the Boston College Center for Work & Family is to build a bridge between representatives of these two worlds. Findings from both types of research will be used to discuss what is known about the value of flexible work arrangements for both employers and employees.

Corporate Research. Organizational/corporate-based research has indicated, in many cases, that FWAs can enhance employee productivity, increase job satisfaction, facilitate recruiting and retaining

methods for providing flexible work options for hourly workers were revealed in this study (Swanberg, James, Werner, & McKechnie, in press).

With respect to organizational outcomes, there is evidence of a positive relationship between flexible work arrangements and improved employee commitment, job satisfaction, and reduced absenteeism and turnover (Almer & Kaplan, 2002; Bailyn, Fletcher, & Kolb, 1997; Parker, Baltes, Young, Huff, Altmann, LaCost, & Roberts, 1999; Gover & Crooker, 1995; Kopelman, 1986; Kossek & Oseki, 1999; Hohl, 1996; Pierce & Dunham, 1992). In particular, in research conducted with six companies (Amway Corporation, Bristol-Myers Squibb Company, Honeywell, Kraft Foods, Lucent Technologies, and Motorola, Inc.), the Boston College Center for Work & Family found that 70% of managers and 86% of employees reported that flexible work arrangements have a "positive or very positive impact on productivity" (Pruchno, Litchfield, & Fried, 2000, p.3). Moreover, the study found that 65% of managers and 87% of employees reported a "positive or very positive impact on quality of work" in conjunction with being able to work a flexible arrangement (p. 3). Additionally, results from this study indicate that 76% of managers and 80% of employees associate flexible work arrangements with "positive effects on retention" (p.3).

From both streams of research, corporate and academic, we can find favorable associations between flexible work arrangements and employer and employee outcomes. Findings from both sources of data have been summarized in order to assist practitioners in making the "business case" for the development and maintenance of flexible work options (e.g., Questions and Answers about Flexible Work Schedules: A Sloan Work and Family Research Network Fact Sheet).

Nevertheless, some contention and confusion remain about the relationships between work-life initiatives and employee and employer outcomes for the simple reason that there have also been some studies of flexible work options that have not produced such positive results. Rau (2003) observes that while high flexibility can improve the ability to manage work and family demands, it can also result in increased role-blurring, which in turn creates confusion about which demands (work or family) should be attended to at any given time, increasing role conflict. Moen and Yu (1999) found that those with more schedule irregularity have higher work-family conflict. Work-family conflict itself as an outcome of choice has been called into question (MacDermid, 2005; Sutton & Noe, 2005). Van Dyne, Kossek, and Lobel (2007) assert that reduced face time can have a negative impact on work group processes and effectiveness. Recently, a rather significant challenge to the business case for work-life programs was made by Bloom, Kretschmer, & Van Reenen (2006), who charged that work-life policies add little to employee productivity over and above good management practices.

Are Flexible Work Arrangements Used? Another wrinkle in the link between flexible work arrangements and positive outcomes is research demonstrating that access or utilization of these options remains limited (Applebaum & Golden, 2003). Using a broad definition of workplace flexibility, authors of the 2005 National Study of Employers (Bond, et al., 2005) reported that among the organizations that were surveyed (a sample of 1,092 employers across the country with 50 or more employees), a wide range of FWAs were available, including compressed workweeks; control over break times; choice of shifts; periodically moving from full-time to part-time status in the same position; job-sharing; working at home or off-site; gradual entry to work after childbirth or adoption; phased retirement; educational leaves or sabbaticals; working only part of the year on an annual basis; paid personal leaves; ability to change start and stop times on a periodic or daily basis; and control with respect to unpaid and paid overtime hours. Despite the many varied FWAs surveyed, "the proportion

of employers offering flexible work options to *all* or *most* employees is 24 percentage points lower than the proportion who offer the same options to some employees" —with the most prevalent option being a gradual reentry to work following childbirth or adoption (67%); and the option to work from home being the one least likely to be made available to all or most employees (3%) (Bond, et al., 2005, p. 5). Interestingly, in most cases, the study also finds that small employers (50-99 employees) are significantly more likely to offer flexible work options to all or most employees than large employers (1,000 or more employees), even though large employers have more policies and programs (Bond, et al., 2005, p.5).

Similarly, with respect to limited access to FWAs, summarizing across several studies using nationally representative samples, MacDermid & Ya Tang (2006) contend that workers who are male, older, have more education, or who have higher-status jobs have more access to flexibility than lower-status workers. Workers in unionized jobs or jobs in local government, K-12 education, health care, other services, or retail sales had reduced access to flexibility, as did workers who were members of ethnic minority groups and workers who worked night shifts. Swanberg et al. (2005) found comparable results in their analysis of data from the 1997 National Study of the Changing Workforce. Specifically, their results suggest that hourly, lower-wage workers, unionized workers, and workers who make up the lowest educational attainment category faced a number of restrictions in terms of access to FWAs. Surprisingly, contrary to other research findings, Swanberg et al. (2005) also found that working full-time and working day shifts was predictive of limited access to certain FWAs such as flextime, schedule control, and time off to attend to family or personal responsibilities.

Even when workers have greater access to flexibility, they often feel that they cannot use it. Blair-Loy and Wharton (2004), in a study of managers, report that workers who felt the most constrained in terms of using FWAs were those with the highest status, income, job demands, and pressure at work, and those who have the lowest control over their jobs. In some cases the inability or reluctance to use FWAs is associated with the fear that using flexibility will negatively impact wages, performance reviews, and/or career advancement (Cohen & Single, 2001; Nord et al., 2002). Glass (2004) found that women who availed themselves of flexible schedules suffered wage growth penalties over a ten-year period—basically anything that reduced face time depressed wage growth. Judiesch and Lyness (1999) found that managers who took leaves of absence, for illness or family reasons, subsequently were promoted less often and received smaller salary increases. In some respects, there are good reasons to think twice about making use of FWAs. When the organizational culture does not support the policy, it is an empty promise (Harrington, 2007; Lambert & Kossek, 2005).

Have Organizations Changed to Accept New Ways of Working? Limited access and perceived penalties aside, perhaps the greatest barrier to making FWAs work to the desired extent is the lack of change in organizational cultures. Many companies still appear reluctant to move away from traditional attitudes towards work and the workplace to embrace fully new ways of working. Kathleen Christensen, a researcher with the Alfred P. Sloan Foundation who is committed to making FWAs the norm in the American workplace, summarized broadly from 15 years of Sloan-funded research:

> *Based on our findings, it is fair to conclude that standard full-time workweeks and rigid career paths dominate the American workplace, not because alternatives cannot be worked out, but rather because these conditions of work are so firmly established in our habits and attitudes that we lack creativity about nonstandard hours or variable career paths—if we think of them at all.*

> *And in the occasions that more flexible conditions are arranged, we look down upon them as less serious. This rigid full-time structure is clearly at odds with the flexible way that many Americans want and need to work. (Christensen, 2006, p. 725).*

So, even though the results from the 2005 National Study of Employers (Bond, et al., 2005) indicate that 47% of the companies surveyed are looking to support FWAs as effective incentives to recruiting and retaining employees (key factors often associated with business success), only 31% of organiza-

Suggestions from previous research about the successful implementation of any of these programs or new ways of working seem to have merit, but many of these suggestions are still relatively general in nature (Nord et al., 2002). There are broad "how-to" guides such as the WFC Resources' book, "**The**

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There are a number of research steps that need to be performed at the outset of implementing a new flexible work arrangement.

- Explore and understand the needs of the employees.
- Examine the organizational culture to determine the level of support for the effort and what practices will need to change.
- Identify potential obstacles and develop approaches for overcoming them.
- Anticipate downsides to the flexible work arrangements under consideration.

Understand Employees' Needs

The first step in this process is to understand what the employees really need. This is generally achieved through employee surveys, but can also be done using focus groups or meetings with various employee groups. Four different respondents had the following suggestions.

> *Don't be obsessed over what other companies are doing. It really has to be driven internally first, in terms of what are the right programs and guidelines.*

> *Survey your employees to see exactly what their needs are and what they are looking for; and see whether the flexible work arrangements are meeting their needs.*

> *Be open to new ideas, new ways of working. Genuinely listen to your employees' needs and do not dismiss ideas that challenge the status quo.*

> *When designing your program's policies, definitely socialize the concept and get feedback from many teams and departments because that is very helpful in terms of advising and formulating something that will work well for the firm.*

Analyze the Organizational Culture

The resistance of organizational cultures to change is surely a major factor in the implementation gap. Our respondents told us that their organizations, while progressive in many respects, were slow to embrace the new ways of working. Success required adjustments on the part of both the employee and the employer/manager.

For example, one human resource director said, "...we have a lot of history and legacy, things that are very difficult to change because they are so deeply entrenched in an 80-year-old culture." Another said it this way: "...[this change] is adaptive, meaning you are changing the way you see the work, your work, you know sort of how you operate; it's completely changing."

Managers are often resistant to these programs, particularly at first.

was helping to implement a very significant cultural change said that, "...when you think about what work is, all the beliefs we have about work and the way that it needs to happen, we are undoing all those beliefs that people have built over their whole lives to think about work in a certain way." Getting over such beliefs constituted a significant obstacle.

As well as tacit cultural obstacles, a more concrete problem mentioned was the issue of how few people could afford to work less when it meant reduced pay. "There is a limited population who can do this and that's not always driven by the firm....so there are some cultural boundaries there that I don't know how much we'll be able to impact, but we want to make sure that everyone who really wants to try this has an option or everyone who can afford to has the ability to."

Many of the companies we interviewed have come a long way and worked through these and many other challenges. Most of them, however, recognized that changing the way they work is neither easy, nor fast—"...and because this change is... it's adaptive and not technical; we needed people to want it bad [sic] enough to do the hard work." Many of our respondents pointed out that there was much care and feeding associated with making such dramatic changes in the culture. For example, one HR director mentioned that, "Continuing to nurture our culture as we grow is really a key...definitely important." Another mentioned that the organizational change continues: "...[there are] certainly more changes as [we deal with] a situation where [new employees] are highly sought-after talent, and they're fewer and fewer. The big changes under way are in terms of how you fill some of these gaps.....we are going to have to learn to do our work differently, and that is going to be painful [for some of us]. In short, the work is not done just because the organization has begun the process of making change."

In many cases, the change occurred over many years, and was a slow evolution. In the words of one HR director, "...I think [the change to part-time schedules] has been a part of our cultural change over the past, I guess, 16 years because it was in the very early '90s...that we rolled out a program, and...flexibility was a part of it." In this same organization, the chairman made options for flexible work arrangements a program for a few years and enforced it. The HR director told us that the program then naturally evolved into a culture, and "it's just the way it works now. But if you think about it, we've been working on it 15 formal years." Another respondent said that change had occurred because of a program they implemented, but that it was more a "manifestation of a general change that happened over a number of years." One respondent said that the Flexible Work Arrangement Database works a lot better today than it did five years ago when they first rolled it out. In her words—

> *It was a little bit of a rogue policy back then...so the challenge really over the past five years has been how do you close that gap between perception and reality? And you know how do you do that? Well, you have to make sure that the culture really enables people to take advantage of these programs.*

Another representative said, "So, we are actually seeing that shift start to happen, which is really exciting from a change management perspective, because everybody says you can't change culture. It is what it is." Clearly, many of our respondents saw the difficulty, but stayed with it; many of them still struggle, but more are starting to see that the culture has actually changed, reflecting a new day of respect for employees and their needs outside of work. Some, of course, are in the early stages of making these kinds of changes.

In sum, on the basis of our conversation with human resource directors, managers, and employees, the successful implementation of flexibility is strongly driven by the company's culture. When the culture is supportive of these initiatives, they seem to be successful. When the culture is not supportive, they rarely succeed.

stronger and stronger, and the leaders had to listen. The resistance was used in a positive way to get more of the population going through the migration. The people created the management tension, not the facilitators.

Managers were also allowed to determine whether employees were qualified to work at home or not.

Empower employees
New managers who join the organization often have some initial misgivings about [our program]. The employees are so strong now in their convictions that even if a leader expresses some thoughts that go against the philosophy, the employees' first instinct is to educate him or her. They want to educate people who are entering this new culture and they want them to understand why this is so good for business.

It's a two-way street
It needs to work both ways. Managers and companies need to be flexible in allowing part-time work, and employees need to be flexible to meet whatever requirements that the company has. If this condition is met, then the arrangement should be beneficial for both the manager and the employee. Employees need to say to their managers, "If you get in a bind, I will be there for you." That will relax the manager and alleviate their nervousness that they may give you something to do and you will not be able to get it done.

Find a champion
But there was a lot of trepidation of these types of things and it really required a lot of education. And I don't know that we had a champion who remained behind it, but we did have overall support for doing it and in getting there it was a lot more painful than I would have thought. ... Our VP of HR was definitely committed to doing it.... She was really the one that kept it front and center.

Employees were skeptical about flexible work arrangements for two reasons: (1) that their career would suffer if they took the option, and (2) that they would be forced to use the program. In both cases these obstacles were overcome through communication and education showing examples of successful employees who had taken the option to work flexibly, and also making it clear that not only were the programs not mandatory, those running them knew they would not be a good fit for every employee.

Provide examples of promotions
We have had individuals promoted who are on a reduced workload. We've had individuals who made partner who were on a reduced workload.

Make it clear that flexibility is not one-size-fits-all
But what we try to do is really promote the idea that flexibility is a tool, working when it is best for everyone, where it is best for everyone. It is just another option that people have, and it is never going to be a one-size-fits-all.

Make the program reason-free, a choice for any personal goal
So really it's trying to strike a balance ...a kind of integration. We tried to provide some examples of ways that you might use the programs for those that I mentioned before... But we use those more as examples rather than saying these are the hard, fast ways that you have to use this program. So

we really just created a final category that says create your own. So if none of these examples work for you, here are some other ways that might help you do it.

There were often some start-up difficulties in getting the needed technology to work properly, particularly for teleworking programs.

IT concerns were overcome by continued talking and working with the IT group, and also by presenting them with metrics showing the challenges that teleworkers faced as they worked to set up their home offices, particularly from a technical perspective, such as how long it takes to close a trouble report. Presentations were made to IT management who understood the challenges, recognized their shortcomings, and agreed to dedicate a resource.

Significant change in work arrangements, particularly changing the hours when employees are available, often raises the concern of potential impact on customers. Our respondents generally addressed this issue by talking to the customers directly, explaining the change, and presenting them with a workable solution.

Customers and other organizations were provided emergency contact information and informed about the schedule.

Not surprisingly, major changes in work arrangements also bring significant resistance from many fronts.

There have been many significant obstacles to implementing [our program]. People's core beliefs and behaviors need to change for it to be successful. They need to think in a very different way, and it is a very difficult change for many people to go through. It takes six to nine months to move a team from traditional methods to [a results-focused approach]. It is not simply putting another program on top of a current situation. Instead, it is getting to the core of the problem and changing things at a fundamental cultural level. The core problem is not just "trust," but at an even deeper level, the problem is the industrial work model.

Identify Potential Downsides

Although our respondents were largely positive about flexible work arrangements, they did identify a number of potential downsides. Some of these downsides are specific to particular types of FWA, while others are common for nearly all of the flexible arrangements. Understanding the various downsides is helpful in gaining commitment for the program and designing it in a way that downsides can be avoided or at least minimized. Our respondents pointed out some general downsides and some that were associated with a particular flexible work arrangement. These are presented below.

One of the common complaints we heard is that flexible work arrangements make managers' jobs more difficult. Managers find that their employees are not always available when they need them.

> *You know, all types of flexibility can make a supervisor's job harder because they can't walk over to somebody's desk ... between 7:30 and 4:15, and get to the people necessarily.*

Moreover, the use of these flexible work arrangements can add another set of potentially difficult decisions and more work to their jobs as well.

> **Managing in the "gray area"**
> *It's harder, yes. It is just one more thing where, you know, as a manager, you have to exercise your discretion and make a choice on something that is very gray because there aren't very stringent guidelines of when it can be used and when it can't be used.*

> **Managing the added head count**
> *There was a reason for that because as I mentioned earlier, when a manager allows a job-share, you're in essence— you'll have one more head count under you. That's another person that you have to manage, that you have to do performance reviews on. I mean it's just like another whole*

One employee mentioned the importance of taking responsibility for making her work visible to the organization and reintroducing herself upon return from an off-shore assignment.

> *I did find I had to reintroduce myself to my organization when I was on assignment to the U.S. So I was out of pocket, out of sight, out of mind. That cliché does apply and you have to make a conscious effort to re-establish or tell people that you are still there.*

Teleworking carries with it a number of additional potential downsides, primarily due to the reduced amount of face-to-face interactions. One respondent said, "I do miss the teamwork and the camaraderie of being there with my teammates." Another raised an important difficulty associated with teleconferencing. "When you're on a conference call with a lot of people, I can't see their visual reactions." Teleworking requires some initial adjustments from everyone, but particularly from the employee who is teleworking.

> **Learning to work alone**
> *The first day is going to be really tough for you because you have nobody around you. So for the first two weeks prior to it, we actually sit them together in a team environment ... on a different floor of a different business, and we allow them to work together and use their tools, so they understand how it's going to be.*

> **Developing technical skill**
> *You do have to have a degree of technical skills for a teleworker because you don't have your IT guys.*

Not everyone is suited to teleworking, particularly full-time teleworking. It requires discipline to stay focused on the work, and also discipline to leave the work behind when it is time to be away from work.

> **Acquiring discipline**
> *You can't be a teleworker if you're not motivated and hardworking because if you can't find self-motivation sitting here by yourself at your computer, your productivity is going to drop.*

> **Dealing with distractions**
> *When you have a young family, I think it's difficult to work from home sometimes, because there are too many distractions.*

> **Working too much**
> *And it did get a little out of hand at the beginning that I was, you know, working from 8:00 in the morning till 7:00, and would have dinner, and then I'd go back to work.*

Part-time and Reduced Workload arrangements bring an important and somewhat obvious potential downside. Employee benefits are often reduced along with the amount of pay. Some companies prorate the benefits while others do not. Often there are a minimum number of hours required to be eligible for benefits. If the employee wants to work fewer hours than the minimum, he or she may get no benefits at all. And employees who are working on a part-time schedule are subject to most of the

Compressed workweek has a relatively unique set of potential downsides. The longer days require some adjustments by both the employees and the customers.

> **Long days**
> *I think the real challenge is because they're really long days, you have less time during the week to do stuff or activities. I think ... people with children are challenged if their children are involved in sports activities and things.*

> **Unavailability to clients**
> *One of the other concerns when we first rolled it out was working with our customer. Because, you know, they call here on Fridays. And they had to get used to our 9-80 work schedule ... But generally, we've been able to work with all of our customers. They understand our schedule. They know when they can call and they can't get hold of anybody, there's always somebody they can get hold of—if it's an emergency.*

Job-sharing brings with it a number of communications challenges. People who are sharing a particular job need to devote time together to exchange information. Others who work with them can easily be confused as to what to communicate and to whom.

> *So, okay, let's say you've got—Mary and Sue in a job-share, and you have John who shares the territory with them. Well, John is calling on a doctor, and he communicates to Mary about something happening in that office that needs to be taken care of later in the week. Well, later in the week, Sue is working. And you have to rely on the fact that Mary communicated to Sue what needed to be done. You couldn't communicate to her because she wasn't working that day.*

There may also be some initial adjustments required and some work to ensure the relationship is fair to both parties and that neither feels they are doing more than their share.

> *Well, I think it was quite tough for me when I first started because I had been in the position for two years before I went to a job-share. So as far as responsibilities for work, I found myself still wanting to contribute at that full-time level because I had a lot vested into the position that I was in full-time. So, it was tough for me to sort of break away and let someone new step in.*

There is also the risk that people may prefer to work with one member of the job-share partnership more than the other.

> *For some of the people that I worked with, they were like a little bit uncertain about the new person starting, and they wanted to work with me. So, that was a little bit tough for me more, I think. They were just used to working with me. And they didn't necessarily want to have to work with the new person.*

2. [illegible]

Our respondents indicated that there are two important activities that need to be performed to gain commitment for the program.

- Construct a compelling business case
- Obtain the needed support from other people and groups

Construct a Compelling Business Case

Establish the business need. Our respondents were adamant that the most convincing factor involved in successful implementation is the business case. The proposal to develop a flexibility program must be based on some type of business need that leadership of the organization recognizes as a challenge.

Position the FWA as a solution
Look at it as a "solution to a business problem."

Find out what the business needs, what leaders are striving toward
Listen to the way managers are thinking about work-life and which piece will be a hook for them. It must be taken back to the business, back to work effectiveness. It's not that people don't want to do the right thing and they don't care about their people, but they've got to see how it's going to make our business work better.

Connect the dots
Make the right connections for senior leaders to show that this is important for the business.

Try to calculate the cost of the lack of the FWA to the organization
When obstacles were encountered, the leaders of the program presented the business case. It was pointed out that the cost to the company of losing someone is twice their salary.

Be creative
People get very hung up on the term "work-life balance." They get really stuck on it. It can't be balanced. It isn't balanced. For many, it's not really possible to maintain balance. But if you can say, "Well what if we thought about it in terms of how effective we are in all parts of our life," that makes more sense to people. Some of it really is semantics, but whatever it takes to get people there, that's the thing. You have to not get your ego too involved with the word work-life.

Understand the drivers of the program. The most common business drivers mentioned by our respondents fall into the following broad categories:

- to improve competitiveness
- to address changing business conditions
- to improve productivity and
- to increase employee engagement, retention, and recruiting efforts.

Not surprisingly, these also align well with the benefits that representatives of our 20 companies have derived from their flexible work arrangements.

Improve competitiveness. Several of the most progressive company representatives that we interviewed view flexible work arrangements as a means to improve their competitive position. For example, the leader of one company asked his HR group to create a work environment that would be completely differentiated in the marketplace, something that other companies were not doing. Another company realized that meeting diverse customer needs in innovative ways required the organization to be more representative of the groups being served. In order to attract and retain the needed employees, they realized they needed to have an effective program of flexible work arrangements. And finally, one company made the link from employee retention to customer satisfaction to improved business results.

> *Back in the early '90s, we really looked at our most successful financial service centers or branches to determine what made them so successful, and one of the common links among all the high-performing branches were the customers stayed with us the longest and, of course, what kept the customers there is the employees were the ones who had been with our company the longest. So, we thought, we made that link, of course, that if we keep our employees, we keep*

Focus on continuous improvement

To me, the [program] is a continuous improvement in productivity approach, and flexibility is sort of a sideline or catalyst for these types of improvements, and I think some people think of this as a flexibility program, but I see it more as a business improvement program. So, it is the marriage between flexibility and continuous improvement to achieve increased productivity.

Collect stories of cost savings

About two years ago, some executives at [our company] read an article indicating that all of Jet Blue's reservation agents work virtually. They did a benchmarking project with AT&T, Boeing, IBM, Jet Blue, and other companies that reported productivity gains in the 20% range and savings on facility costs. These executives arranged for a pilot of a similar program at [our company] and it worked reasonably well. Productivity was enhanced and there were savings on facility costs.

Improve employee satisfaction, engagement, retention, and recruiting. The driver for new flexible work arrangements that was mentioned most often was the need to recruit and retain talented employees. Not surprisingly, the work arrangements that support recruitment and retention also align well with ones that increase employee engagement and improve employee satisfaction. Our respondents knew that if employees are happier, they generally are more engaged and more likely to continue working with a company. Our respondents also believed that a company culture that supports flexible work arrangements is also an environment more likely to attract new employees.

It was also clear from our respondents that the needs of employees are changing, and the companies need to adapt to those new needs. There was recognition that the success of the company was dependent on the happiness and success of its employees. The importance of employees is often included in company values statements, and in at least one company we talked with this was a foundation for its work-life principles and policies. Companies often do employee surveys, and these can lead to improvement initiatives as well.

Find out what would make employees want to stay

Company leaders then gathered information from employees throughout the company through focus groups and surveys to find out what it would take to make them want to stay with the company, to be successful. They learned two major things. What they found was that employees wanted more control over how they got their work done. They wanted to be empowered to make decisions and get their work done in a way that made sense to them. Employees also said that they needed help in taking care of their work and family responsibilities, balancing that out. Thus, making flexibility available became a big part of being able to put employees first, and enabling employees to be home with their families when they needed to be, and still able to take care of their work.

Understand the demographic makeup of the organization

An internal work-life needs study of [our company's] U.S. workforce practices conducted in the 1990s highlighted how really nontraditional the workforce was becoming. The CEO at the time, [named person], aggressively challenged the status quo and started cultural change initiatives, especially in the area of work-life. Although at the time there was a perception that the families of [our company's] employees were mostly traditional, the results of the study revealed that the company was not a company made up largely of men with stay-at-home wives, but in fact had a very diverse population with all kinds of family situations and needs.

A solid majority of our respondents indicated that the shift toward more flexibility in the workplace was the inspiration of a single "champion," most often someone from the "top of the house." One HR manager described the senior manager driving the program at his organization as an individual who passionately believed in work-life balance and who saw the implementation of the program as an opportunity to make this a more central part of the philosophy of the whole company. Another work-life advocate talked about strategies for finding your own champion when no one comes forth initially.

> *If there is no identified top-down champion for a program, it can open the doors for a work-life advocate to get into various levels of the organization that really do the work. It is very important to pick a leader and to help them have the vision.*

When identifying who may be willing to act as a top-level champion, it seems clear that managers who already appreciate the benefits attached to flexible work arrangements will be likely to support the effort. Managers with young families were noted as key champions by several of our participants. For example, one of our respondents mentioned that the president of her company had a real feeling for what the company could be like if people felt that their personal priorities were respected and deemed important. Another respondent was more pointed about the matter and stated the CEO championed work-life policies because "...the fact that he was under 50 and had several young children...and a wife that worked...outside the home for quite a long time..." made him an active proponent of flexible work arrangements.

Some of our respondents talked about leaders who made use of the programs themselves, some by teleworking one day a week; another by refusing to hold meetings before 9:00, when s/he generally arrived, having spent time with the children before school.

Some actually began with a team approach. For one organization, the history was that the founders of the organization began with the idea that a positive work-life culture was a necessary ingredient of its success. For another, top leadership together provided support, including officers of the company and the executive leadership team.

Clearly, not all senior managers will be leading the effort to implement new work arrangements. However, a broad base of open, clear senior managerial support of the programs through the managers' actions and willingness to adapt their own work styles to fit with the program is extremely helpful. When obtaining buy-in, it is critical to ensure that the program is going to receive more than lip service. For example, one participant explained it this way: "You really need to have a commitment to do it. If it is just a surface-level commitment, no philosophical emphasis on any of this, then you are better off not doing it at all." Managers must be persuaded to agree to walk the walk of flexible work arrangements through active acceptance and participation in training, and showing that staff will be supported and not marginalized if they join the program; an issue clearly articulated in the following quote: "It's not easy to get a program like this off the ground. You really need management buy-in, and the company needs to invest money in the effort."

> *Because once you get leadership support, the line partners start to lead with them. The line partners need to know that our program has support from an organizational perspective before they start allowing it in their teams. And then they'll—if they know it's supported from the organiza-*

tional perspective and they know why they manage and they know how to do it, then they're more apt to be able to make it available to their staff.

None of these champions, however, was able to forge the stream of change all alone. With help from various sources including work-life advocates, they built teams, recruited supporters, provided train-

3. [illegible]

According to our respondents, designing the program has to be a careful, well thought out process that takes into account the needs of the staff, the culture, and current work processes in the organization. It is crucial that methods to monitor and validate any program are considered at this stage so that they can be incorporated into the program and are not an afterthought. Finally, no program design should be thought of as final. Our interviews have shown that flexibility must be built into each program to allow for any needed changes that are identified through ongoing monitoring.

Create a Program to Meet Employee Needs and Fit with the Culture

As we have mentioned, our respondents said that a key aspect of program design, regardless of the particular flexibility option being offered, is to ensure that the final product meets the employees' needs. Some used employee surveys, staff meetings, or staff feedback to HR or managers to inform the design process. Some utilized the information coming directly from staff regarding their actual problems and the aspects they need in any flexible work arrangement to determine what type of program is required. The actual design process is generally conducted by HR professionals or managers with input from employees.

The choice of how the program is designed, as well as what form the final program takes, must be undertaken in a manner that is compatible with the culture of the organization. If the culture is very open to new flexible work arrangements, the design of the program will vary significantly from one where a company is getting into this for the first time. The prior sections on culture and obstacles should be used to inform the design, as the culture, the needs of the company, and the needs of the employees need to drivewcultt.ing.

However, under the new conditions they had to coordinate their work, with the result being they created a cohesive and more strategic team overall. A clear issue faced by many of our participants was that the change in work practices sometimes made traditional measures of performance and/or productivity obsolete, leading to a need to rethink the reward systems. One HR manager used this example to describe the change in their organization:

> *...Say I am a change management expert. Okay? And I can take on five projects. That might be considered $120,000. ...But if I decide I want only want to work on one or two projects, maybe that's worth $50,000. I have the same skill level, but I am providing a certain service to the company that is not about again counting hours, but about what is the outcome or what is the value I am providing to the company and what is that worth.*

Even though programs may be initiated and designed based on information about real staff needs, program designers must remember that no flexible work arrangement will be suitable for, or required for, all jobs at every level in the organization. In some cases this meant designing a program that enabled staff to opt in or out of if they wished, while for others the parameters of who could and could not take part had to be clear from the beginning. It is very important that no matter what the program is, and who it is made available to, it is clear that "[T]he program should be consistent and administered fairly." Or as described by another manager, "[F]oster an environment of flexibility--informal and formal go hand in hand." What is key from these statements, and others like them made by our participants, is that flexible work arrangements must be designed carefully and in detail, otherwise there is the opportunity for them to be misapplied or misused, resulting in very little chance of a successful implementation.

> **Examine your own biases**
> *Regarding teleworking, do a careful, thoughtful analysis and interrogate your own bias about whether or not you are comfortable having employees out of your line of sight.*
>
> **Develop guidelines**
> *The program needs to have guidelines so it's not a free-for-all. There are some managers that are much tighter in the way they manage it, and others are much looser. It can take years to establish a successful program.*
>
> **Communicate expectations**
> *[Our company] has a contract that both job-share parties sign that outlines each of their responsibilities, the days they will be working, what accountabilities they have. Either party in a job-share or the organization can opt out based on what the business needs are for the organization or the circumstances are for the individuals. If they decide that they want to go back to full-time they can. Review these agreements on an ongoing basis to make sure that there is clear communication around expectations to employees, to managers, and to HR.*

The flexible work arrangement must itself be flexible. Even with careful attention to detail in the design process, any new program will have some teething problems, and there is always some unforeseen circumstance or issue that will crop up. To be successful, the programs must be designed with built-in flexibility. Ongoing monitoring of the programs, followed by changes and adaptations as soon as any problems are identified, are key to long-term success.

Basically, first and foremost from my eyes, you're focusing on your outcomes. Are we delivering the outcomes that the business needs to move forward? And the first [answer] should always be "yes." And the follow-up to that is allowing individuals the flexibility to determine how they can achieve those outcomes. And that can be as tactical as how and when and who you engage to

4. [illegible]

There was broad agreement across the organizations we studied about the importance of taking time with the implementation, to "[T]ake it one step at a time and recognize you're not going to go from zero to a hundred miles an hour right off the bat." However, in some cases, due to the nature of the program, the best approach may be to "[R]oll it out to the whole workforce at once."

Establish Needed Implementation Infrastructure

No matter which approach was taken there were a number of recommendations made about formalizing the program, getting the needed policies in place, and setting up the needed infrastructure before rolling the program out. Not only can this preparation make rolling out the program much easier, but it can also help to prescreen for problems such as payroll or benefits issues that may cause a lot more work to sort out retroactively than they would have up front.

A key learning point is that all of the required facilities, policies, training sessions, and materials need to be available. As described by one participant, you need to think broadly about what may be required: "Formalize the program—insist that participants and their supervisors attend required training and provide the proper tools for teleworkers: ergonomically correct office furniture and fully supported computers, faxes, printers." However, also use the materials as an opportunity not only to clarify what the program does, but to underscore what the program does not do, and who (if anyone) it is not suitable for:

> *Provide good program documentation that is readily accessible. Use this documentation to emphasize that teleworking is not right for everyone—i.e., not all jobs can be done remotely and not all employees are suited to work remotely.*

Formalization of the program means more than laying the groundwork, but setting up the management structure to oversee and coordinate the effort. As explained by one participant: "You need to have one or more people whose formal job is managing these programs. There needs to be some organized, concerted effort if you really want it to take hold."

Determine Rollout Approach

There was not a clear consensus on whether to do a pilot test of the program, although in general a pilot implementation was completed for most of the companies we studied. That determination seems to depend on the type of program being offered and how different it is from the work arrangements that currently exist in the company. However, there were many benefits related to piloting the program, including testing the design and the experience of actually running and managing the new program.

One HR representative explained how they piloted their program because flexible work arrangements were very new to the culture of the organization, but after they tried it out on a small scale for 90 days

and it proved successful, they officially rolled it out to the rest of the organization. In another organization, the pilot program was developed specifically to test for any necessary policy or program changes, and once they had dealt with any issues that arose they rolled it out to the whole organization. The benefits of piloting were succinctly described by one participant in this way:

> *Start it on a pilot basis so that you can see what issues are germane and particular to your organizations. What are the challenges? What are the things that you really haven't thought through that you would want to include?*

A key issue with pilot programs is the selection of the pilot group. In our study, we found that many organizations used different rationales for determining which employees or departments would form the pilot groups. Some comprised those employees who had raised the issue of the need for the particular flexible option, while in other cases there was a more targeted design and rollout of the program.

Create and Implement a Communications Plan

A clear lesson illustrated in the participants' discussions of their communication plans is that the communication methods related to flexible work arrangements should be designed to educate and to support change at all levels of the organization. There were a wide range of different approaches to the initial communication of the programs, including top-down and bottom-up. A top-down process involves focusing on top and senior management first, and using them to cascade the information down to all other levels of staff. This process was clearly described by one of the HR representatives:

> *Phase one is all about educating the leadership of the team. Usually that is anyone director level or above. Talking with them about what the philosophy of a Results-Only Work Environment is and what the business benefits are that they can expect once their team becomes results only, and obviously there're a lot of questions and answers too. Because leadership tends to be fairly anxious and nervous about what is happening, although they know that in the end they will be experiencing business benefits that will be wonderful. So once that first phase is done, then we move into the second phase, which is bringing in the rest of the team and kicking off for them what the results only philosophy is all about. And bringing them into a couple different sessions that focus on getting rid of the language in the work environment that makes judgments about how other people spend their time.*

Another reason top management may be used to communicate the process is that this is a way to underline high-level support, for example, by using an email from the president to introduce the program before proceeding with a wider campaign of posters and web postings.

On the other hand, some organizations used a "stepped-in" approach and targeted specific departments, areas, or divisions to use their expertise to communicate specific information about the project.

Finally, a bottom-up method of using staff to spread the word almost informally about the program can be successful, as explained by one HR manager: "[T]his is very much done on a grassroots kind

of letting it spread, word of mouth." "Communicate very well up front. Start small and let it spread naturally." Although one participant spoke strongly against this method, as there is no real control over whether staff hear the message or the content of the message they hear with a word-of-mouth rollout, and stated that: "If you want flexible work arrangements to be used in your company, make your people aware of them. When you make them aware, do it in a disciplined manner so that the message gets out to the people in the company much more frequently, and try not to do it on an ad hoc basis."

In summary, our respondents told us that the rollout communication should be designed to match the specific program and the organization. There is no reason to communicate to the whole organization when only a few groups are involved, and if information is generally communicated through informal channels, this can also prove successful for new flexible working programs. However, involving top management in the rollout communication process provides another opportunity to signal to staff their support and belief in the program.

Develop and Provide Necessary Training

Training is believed by some of our respondents to be key to the successful implementation of flexible work arrangements. As noted by one participant, "Be sure to provide the necessary training." Choice of how to design the training program again appears to be based on the program and the organization. The majority of the organizations in our study focused on a few key groups of managers or HR professionals initially, and after ensuring that these groups were fully trained, then rolled out training to the general workforce. Rolling out training to the employees in general can be done through formal training courses/information sessions, or as in the case of many of the organizations we studied, by providing information and leaving the training and education of the employees to their managers.

5. [illegible]

One of the key success factors mentioned by our participants was ensuring that the program stays in people's conscience long after it is first rolled out. This is not easy to do given all the various demands on employees' time. Keeping the program alive requires perseverance, measuring progress, reporting results, and taking action to improve the program where necessary. Ongoing communication about the program(s) is clearly useful as well.

Regularly Review Program Utilization and Other Measures

Nearly all of the companies in the study have methods for measuring utilization of the various programs. One company has a database for tracking all formal flexible work arrangements. However, most companies do not have complete tracking systems, and in many cases they simply do not trust the data. Utilization data can be difficult to collect for certain arrangements such as flexible work schedules, where there is no easy way to track individual employee work schedules. The companies often track full-time teleworkers, but have great difficulty tracking the number of workers who occasionally work from home. Part-time work arrangements can be tracked relatively easily in most HR systems, but job-sharing arrangements are often more difficult to track. Some companies rely on self-reporting from employee surveys to track utilization. Many of the companies believe that the utilization rates are actually higher than the rates they are able to calculate, due to employees' use of informal work arrangements and various difficulties with their tracking systems.

> *There is a designation in the company's SAP system that allows us to track teleworkers. There are currently 160 teleworkers. The number has doubled in the past five years.*

> *There is a tracking system but it undercounts. It is more accurate for teleworking than other things like flextime. Flexible work arrangements are so much a part of the culture that people sometimes do not think about the fact that when they "flex" their schedule, it's a flex arrangement.*

Because of all of these factors, utilization rates of various types of flexible work arrangements appear to be unreliable. Utilization rates collected for this study vary dramatically depending on the type of program and the company. Several companies reported overall utilization of formal flexible work arrangements to be in the 10-15% range. When informal arrangements are included the rates can be in the 50-100% range.

> *Self-reported utilization of formal alternative work arrangements is about 12-15%, and this is believed to be underreported. When you add informal flexible work arrangements, utilization is much higher.*

> *On the Employee Value Survey, employees are asked if they have used any type of workplace flexibility over the past year. Last year over half of the employees said that they had, and 84% of them said they had at least adjusted their hours occasionally to help take care of their personal responsibilities.*

The following chart shows "typical" program utilization for organizations where the program is offered.

	Utilization Rates	Flexible Work Arrangement
High Utilization	25–100%	Flexible start and end times Compressed work week (4 10-hour days or 9/80) Occasional teleworking Results-Only Work Environment
Moderate Utilization	2–24%	Full-time teleworking Job-sharing Reduced workload
Low Utilization	Less than 2%	Part-time work Phased retirement and other off-ramp programs

Most of the companies included in the study also regularly collect employee survey data. The questions related to work-life vary by company with most having at least one question related to work-life balance, such as "my company encourages work-life balance," or "I am able to balance my work and personal obligations." Several companies use employee surveys to track employee engagement and company loyalty.

Tracking questions on a survey

The company also collects employee survey feedback on its work-life programs. For the question "my company encourages work life balance," we received a 90% favorable approval rating, 10% above the average of the other 99 companies that made the Fortune listing. In the Computer World listings for the question, "I am able to balance my work and personal obligations," we had a 92% favorable approval, 22% above the average of the Computer World-listed companies.

There is a global employee survey every other year that has a set of questions around work-life, and a set of questions around diversity. Built into the survey is a fairly traditional section on employee engagement. In the U.S. there is an additional set of ten questions that correlate with high-performing teams in the field.

Several of the companies also use employee surveys to check on utilization rates of the various programs. One company found that utilization was actually higher in the survey than the tracking system showed.

Surveys indicate that the utilization is actually higher than the tracking system shows. Overall at headquarters, nine out of ten people use some kind of formal/informal flexibility of one kind or another.

There are a number of other data sources that companies use as well:

- anecdotal data, real-life examples, and testimonials
- feedback from employee forums and debriefing sessions
- time tracking systems
- performance metrics for organizations using flexible work arrangements
- percentage of jobs offered where alternative work arrangements are available
- cultural audit information before and after major change initiatives and
- voluntary turnover.

Collect Feedback and Make Needed Changes

As noted previously, programs should be designed with flexibility built in to allow the programs to be fine-tuned as they progress, particularly at the beginning. Employee satisfaction surveys may provide useful data, but informal feedback from those who are using the program is probably the best source for determining what needs to be improved. If there is a regular FWA review process between manager and employee, these reviews may be a good source of information.

It is essential to nourish the culture of flexibility, and management support is particularly critical for doing this. If the managers are not supporting it, it will be evident to the employees, and the program will not be utilized effectively.

Work to increase employee faith in organizational commitment to the program
We're now currently reassessing the best way to keep this top of mind, because we have so many things to offer, and so many competing demands on people's time, that we have to keep this at the

20

Introduction to Case Summaries

This section of our report presents a summary of the detailed information we collected from each of the 20 model programs. First, we examine the various types of flexible work arrangements that are included in the study, why they are needed, and some background information for each. Then we provide a summary of our conversations with representatives of each of the companies who agreed to share their experiences with us. Each one contains valuable information about the drivers of the program, the structure of the program, some obstacles faced and overcome, quotations from employees who use the new way of working, and supportive comments from these employee's managers.

What Are Flexible Work Arrangements?

Flexible work arrangements can take many forms and can be either formal or informal, but most involve giving employees greater control over when and where work gets done and over how much time they choose to work. The flexible work arrangements included in this report are: part-time work, job-sharing, teleworking, on- and off-ramp programs, compressed workweek, the BOLD Initiative, and the Results-Only Work Environment. Information on each of these flexible work arrangements is included below.

Part-Time Work Overview

Definitions. From an employee perspective, part-time work might include working fewer hours or days per week, sharing a job with another employee, or reducing one's overall workload. Part-time employment refers to working less than 35 hours per week (Leonard, 2000). Reduced workload has been defined "as working less than full-time, for example, four instead of five days a week, and being paid less accordingly" (Lee & Kossek, 2004, p. 1). KPMG uses the term "reduced workload" to refer to a percentage reduction in work responsibilities or projects. Job sharing involves two or more employees sharing the responsibilities of one full-time job (Harrington & Hall, 2007). The following section focuses specifically on part-time work.

Who works part-time? Though increasing numbers of both men and women would welcome part-time arrangements, the majority of part-time workers are still women (Harrington & Hall, 2007; Moen, 2003). Estimates find women constitute approximately 70% of the part-time workforce (BPW Foundation, 2004), with their rate of participation being three times that of men (22% and 8%, respectively) (Comfort, Johnson, & Wallace, 2003). Further, married women with children are most likely to be working part-time, whereas single men without children are least likely to seek part-time employment (Wharton & Blair-Loy, 2002). Regardless of gender, it appears that the majority of employees who choose to work part-time do so voluntarily (68% of women and 51% of men) (Bond, Thompson, Galinsky, & Prottas, 2002).

With respect to education, there appears to be only a weak correlation between educational attainment and part-time status for men and women in their prime working years (EPF, 2003). Still, part-time workers tend to possess lower levels of education. This trend is more pronounced in the case of involuntary part-time status, with an Employment Policy Foundation (EPF, 2003) analysis finding that men "who have less than a high school diploma are three times more likely to be working part-time involuntarily than those with a four-year degree" (p. 2). This correlation is more pronounced for women, with those holding a high school diploma being "3.8 times more likely to work part-time involuntarily" compared to women with a four-year degree (EPF, 2003, p. 2).

In terms of availability, research suggests that more than half of organizations (approximately 53%) offer employees the option to move to part-time employment and then back to full-time status while holding the same job (Bond, Galinsky, Kim, & Brownfield, 2005). Part-time status also seems to be more readily available in larger organizations "with 91% of large establishments with 1,000 or more employees reporting part-timers on staff" (Comfort, Johnson, & Wallace, 2003, p. 12). Part-time work still appears to be most concentrated in "service occupations," "transportation and material moving occupations," and "sales and related occupations" (EPF, 2003, p. 2-3). However, a relatively high proportion of professionals work part-time. One estimate finds that as many as 10% of all professionals are working part-time (Corwin, Frost, & Lawrence, 2001). Even so, there is significant variation among the different professional occupational groups. Of all professional part-time employees, only 2% of men and 5% of women are managers (Comfort et al., 2003). Also, women professionals (20.5%) are more likely then men (7.9%) to work part-time (EPF, 2003).

Benefits and costs of part-time. From an employee perspective, part-time work can help foster greater work-life balance by allowing time to handle child care and other family obligations effectively (EPF, 2003). Such flexibility is found to be particularly true for women. Employment Policy Foundation (2004) analysis of data from 1998 and 2003 finds that 45.5 % of women compared with 12.3% of men cited a need to address work-life balance issues as the primary reason for choosing part-time work. And, of those men who voluntarily chose part-time work for balance reasons, it was, "in large part, to attend school or training and not for reasons related to child care or family obligations" (EPF, 2003, p. 3). Studies also show that men and women with higher levels of education (i.e., having at least a two-year college degree) and in "white-collar" occupations are more likely than less educated and "blue-collar" workers to opt for part-time work in deference to work-life balance concerns (EPF, 2003, p. 4). Finally, in addition to work-life issues, employees cite a need to reduce stress and search for greater overall life satisfaction in choosing part-time work (Harrington & Hall, 2007).

Part-time work is not without its disadvantages. Employees working part-time earn less pay and risk losing benefits. Most organizations will offer benefits only to employees who work a set minimum number of hours and, even then, employees may be eligible only for prorated benefits. Additionally, employees harbor the concern that working part-time will limit promotional opportunities and stymie career success. For instance, Comfort et al. (2003) find that "[o]nly 17% of part-timers received a promotion at any time since being with their current employer" (p. 21). And, Hill, Vjollca, & Ferris (2004) note that "part-time professionals reported significantly less career optimism and work success than full-time professionals" (p. 288).

From an organizational perspective, offering part-time work schedules can increase loyalty, productivity, work satisfaction, and dedication among employees (Bravo, 2005; EPF, 2003). Moreover, this work arrangement can help organizations keep valued talent in today's highly competitive workplace, par-

employees may work from home the entire week, while others might telework only once or twice a month (Richman, Noble, & Johnson, 2002). Results from CWF's study *Bringing Work Home: Advantages and Challenges of Telecommuting* (2002) suggest that the optimal arrangement would involve working from home no more than three days per week. Spending more time away might lead to feelings of isolation or difficulty conducting work with teams.

Telecommuting has been a relatively widely used flexible work option since the late 1980s (Harrington & Hall, 2007). Current statistics indicate that in 2001, 15% of the employed population in the United States worked from home at least once a week (U.S. Census Bureau, 2003). And, it is forecast that in 2007 approximately 35 million employed persons will have teleworked for more than eight hours per month (Jones Dataquest, 2005). This number is expected to grow to about 36 million in 2008 (Jones Dataquest, 2005). Interestingly, these numbers are still below the participation rates initially projected for the start of the 21st century, which predicted 55 million telecommuters in the United States (Wells, 2001). As with various other alternative or flexible work arrangements, it appears that effective implementation and access issues might be undermining optimal utilization of telecommuting programs in organizations (Nord, Fox, Phoenix, & Viano, 2002).

With respect to access, Bureau of Labor Statistics data released in March 2002 indicates that the highest numbers of part-time and full-time traditional workers who telecommuted regularly were employed in managerial, professional, or sales occupations. Specifically, 29.8% of managers and professionals, and 20.0% of sales employees telecommuted at least once a week. This contrasts significantly with data that finds only 2.2% of operators, laborers, and fabricators, along with 7.1% of precision production, repair, and craft workers used telework arrangements at least one day per week (BLS, 2002). It appears that higher levels of educational attainment and the ability to take work off-site are factors correlated with current access to telecommuting (EPF, 2004). Nevertheless, Employment Policy Foundation (EPF) supported research suggests that 65% of jobs in today's labor market are suitable for telework (Potter, 2003). Finally, in terms of access to telework, men and women are equally likely to use this flexible work arrangement, with 14.8% of men and 15.2% of women working from home at least once a week in 2001 (U.S. Census Bureau, 2003).

Even with access to telecommuting, not all employees are appropriate for this type of arrangement. Research suggests that telecommuting is best suited for individuals who are self-motivated and possess the skills and knowledge needed to work independently with little supervision; have strong organizational, time management, and communication skills; can be trusted to meet agreed-on project goals; and are comfortable with solitary work (Harrington & Hall, 2007).

Costs and Benefits of Telecommuting. From an employee perspective, telecommuting can offer the autonomy and flexibility needed to negotiate work and family responsibilities better. In particular, the time and money saved from not having to commute to work can be used to attend to the care of children and elderly relatives, or to take care of other household duties and personal needs. The reduction of stress and the better work-life balance promoted by telecommuting can, in turn, boost employee morale and overall life and work satisfaction. On the negative side, telecommuting for employees might create feelings of isolation and disconnection from colleagues (EPF, 2004). Also, there may be the concern that lower visibility and presence in a traditional office might limit career advancement and access to more challenging projects. Additionally, as opposed to creating a healthier work-life balance, working from home might make it more difficult for an individual to set clear boundaries between work and family tasks—to the point that an individual might begin to feel that he or she is always working.

There are a number of potential advantages of telecommuting for employers as well. Key among these benefits is increased employee productivity, and reduced turnover and absenteeism. A 2002 EPF analysis indicates that Fortune 500 companies would save $5 million annually with a 1% reduction in the employee turnover rate. Telework can also help organizations reduce overhead and facility costs, and honor federal and state environmental mandates looking to reduce traffic congestion and carbon dioxide emissions (EPF, 2004; Harrington & Hall, 2007). The potential disadvantages of telecommuting for an organization include problems fostering creative teamwork, and difficulty in assessing and monitoring employee productivity and performance.

Concluding Comments. It is becoming increasingly clear to organizations that flexible work arrangements (FWAs) such as telecommuting are highly valued by employees. Many employees state that they would be willing to take a slight reduction in pay in favor of access to FWAs. Moreover, a 1999 Pratt survey found that of the 247 teleworkers surveyed, 53 percent indicated that having the option to work from home would be significant in their decision to consider a new employer (EPF, 2004). To utilize telecommuting arrangements to the mutual benefit of the employee and the organization, research indicates that employers need to consider a number of factors.

First, organizations need to develop an off-site or telecommuting plan carefully that addresses the unique needs of their business and provides a clear analysis of the potential benefits and pitfalls of the proposed arrangement (EPF, 2004; Richman et al., 2001-2002). Second, managers require comprehensive training on how best to support and supervise an off-site employee, so that they can move beyond ineffective "line-of-sight management practices" (Harrington & Hall, 2007, p. 165). Third, organizations need to create a "technology plan that fosters connectedness, not just connectivity" (Richman et al., 2001-2002, p. 5). Finally and, perhaps, most importantly, there needs to be a commitment to cultural change in an organization that embraces change, innovation, and "consciously replaces the office-centered model of work with a mental model of an omni-site extended network, in which distinctions of on- and off-site disappear–and no one is considered remote" (Richman et al., 2001-2002, p.5).

On- and Off-Ramp Overview

With approval from their employer, individuals take various forms of paid or unpaid leaves of absence from work. For instance, employees might choose to take time away from work in response to personal or family illness, military service, the birth or adoption of a child, and for educational or training pursuits. These leaves are typically negotiated between the employee and his/her employer. However, fairly recent legislation, the Family and Leave Act (FMLA) of 1993, requires that all employers with at least 50 employees allow individuals to take up to 12 weeks of unpaid leave annually for reasons specified by the law (i.e., childbirth or adoption; personal illness; or, to care for a sick child, spouse, or parent) (Rudd, 2004). Since the enactment of FMLA in 1993, 50 million employees have taken advantage of this legislation (Pandya, Wolkwitz, & Feinberg, 2006).

Some companies will offer leaves that extend far beyond 12 weeks (Harrington & Hall, 2007). Offering generous leaves (sometimes extending up to five years) to employees can allow organizations to retain skilled individuals (in particular, women postpartum), boost employee loyalty and morale, and reduce costs incurred as a result of high turnover (Harrington & Hall, 2007; Rudd,

both to meet its performance improvement goals and allow team members to flex around their

require much management supervision). Employees know that they have the ownership, control, and autonomy needed to make productive choices regarding their work. Specifically, ROWE is premised around "13 Commandments" of which three key commandments include: "There are no work schedules; every meeting is optional; and employees should render no judgment about how colleagues spend their time" (called "sludge" by CultureRx) (Jossi, 2007, p. 49). With this approach, the boundaries between life and work truly begin to disappear.

Organization of Model Programs

The next portion of the report contains case summaries from individual companies, and is organized according to the type of work arrangement being featured. These are:

- Part-Time and Reduced Workload (First Horizon, KPMG, Alcatel-Lucent, GSK);
- Job-Sharing (TAP and HP);
- Teleworking (Booz Allen, Eli Lilly, HP, Dell);
- On- and Off-Ramp Programs (Deloitte, Intel, MITRE);
- Alternative Work Schedules (Raytheon);
- Linked Business Results and Flexibility (American Airlines, Best Buy)

We also feature model conceptual approaches for making flexible work arrangements more effective, as well as information regarding the company's programs. These are:

- Work Paths [gaining executive commitment] (Takeda)
- Alternative Work Arrangements Proposal Kit (Baxter)
- FWA Database (PWC)
- New Communications Strategy (IBM)
- New Approach for FWA [positioning FWA] (AstraZeneca)

Part-time and Reduced Workload

- First Horizon National Corporation: Prime Time Schedule
- KPMG: Reduced Workload Model
- Alcatel-Lucent: Part-time Work
- GlaxoSmithKline: Part-time Sales Force

Program	
Description	First Horizon's workplace flexibility options include a Prime-Time Schedule. Under Prime-Time Schedule employees who have been at the company for one year or more can work with their leader to determine if a reduced work schedule is feasible. Employees can reduce their hours, if that works in their job, to as low as twenty hours per week, and maintain their benefits. They can do it to take care of a sick parent, have a baby, ease back into the workforce, or ease out of the workforce toward retirement.
Administration	There is information about the program for employees on the employee website. There is not a formal tracking system. Employees are not required to fill out rigorous paperwork. The employee, leader and his or her ESRM, Employee Services Relationship Manager, work out the arrangement. There are guidelines on the Leader website.
Drivers – Why Developed	In the early nineties, the company looked at its most successful financial service centers or branches to determine what made them so successful. One of the common links among all the high-performing branches was customer loyalty and what kept the customers coming back were the employees who had been with the company the longest. The company concluded that if they kept their employees, they would keep their customers and create profitability. Company leaders then gathered information from employees throughout the company through focus groups and surveys to find out what it would take to make them want to stay with the company, to be successful? They learned two major things. What they found was that employees wanted more control over how they got their work done. They wanted to be empowered to make decisions and get their work done in a way that made sense to them. Employees also said that they needed help in taking care of their work and family responsibilities, balancing that out. Thus, making flexibility available became a big part of being able to put employees first, and enabling employees to be home with their families when they needed to be, and still able to take care of their work.
Implementation Approach	The company did the study in the early 90s, put together the various flexibility programs, and rolled out a new culture called Firstpower. About a thousand managers across the company were trained in a two-and-a-half day training session. Training covered three different topics: continuous improvement, empowerment, and flexibility.
Obstacles	The biggest obstacle was getting buy-in from the managers.

How Obstacles were Overcome

Once the managers went through the training and saw the business case, and saw the best practices of other companies, they understood the link between keeping employees, keeping customers, and profitability. Not all of the leaders came on board right away, but over time they saw the value.

Benefits

There have been many benefits.

- It has strengthened the company culture.
- For individuals, the primary benefit is the ability to be productive in both their work and family lives. They don't have to leave their careers to take care of a family need when a new child is born, or when an emergency comes up.
- For managers, they see that their employees are more productive, more loyal, more dedicated to the company.
- The customers like the continuity. They treat First Horizon's employees as family.

Measurement

The company does a Leadership Survey and an Employee Value Survey and, in the 2006 Leadership Survey, ninety-two percent of employees said their leaders supported them taking care of both their work and their personal responsibilities.

On the Employee Value Survey, employees are asked if they have used any type of workplace flexibility over the past year. Last year over half of the employees said that they had, and eighty-four percent of them said they had at least adjusted their hours occasionally to help take care of their personal responsibilities.

Factors in Success

Top-down support has made a huge difference in the program's success. Continued communication of best practices helps convince some reluctant leaders that this really does work.

Manager Comments

"They both [bank needs and employee needs] have to come together. We're not sacrificing one over the other, and it's amazing how well it actually will come together if you just think outside the box. We have very few difficulties, and most of the employees know -- we've been doing this so long and with a really stable management team, that they know when they have to physically be here. I'll give you an example. If for some reason, you want to be in the vault and file paperwork in the vault, well, that's basically got to be done physically here. You can't do that at home. If we get a request that somebody needs prime-time, and they're in a job that really isn't suitable, then we look to see if there's another place they can fit in the division. They're required to be in good standing on their reviews and things like that. We'll bend over backwards. The fact of the matter is it's so hard to find good people that we're better off making accommodations for the folks we know and have been with us. It just makes economic sense to do that."

-- Clay Williams, Senior Vice President

Sponsor Comments

"I think the biggest concern typically is not the employees -- it's the managers -- how we're going to get people to work -- how are we going to get our work done and those kind of things. And believe it or not, you have to have faith -- maybe take a little leap of faith because it does work. You will find that it pays big dividends in the end with the retention, and the loyalty of the folks that are with you -- the fact that you have people who are willing to move around, stay with you, and do differ-

Program	
Description	This program provides a model for reducing workload when a typical full-time job is more than 40 hours per week. The model actually reduces the workload percentage with a comparable salary reduction. It provides clear expectations regarding work responsibilities while still allowing for innovation and flexibility.
Administration	Tools & forms are currently available through HR. Employees discuss proposed changes with their performance manager and go to HR where the forms are filled out. Employees are tagged in PeopleSoft as being on alternative work arrangements and reports are created that show people who are on this type of arrangement. Managers are encouraged to review the arrangements every 6 months.
Drivers – Why Developed	In a very busy professional environment it is quite common for work to take more than 40 hours per week. Calculating part-time as a % of 40 hours isn't fair to full-time workers. The program was first offered 3 years ago. There were perceived inequities and problems with part-time schedules. Some employees complained that their hours were reduced, but not their workload.
Implementation Approach	No pilot test was conducted. Implementation has been held within HR. Discussions were held with scheduling managers so they would be aware of this program and could schedule people appropriately. KPMG is trying to make it easier to use, and has continued to tweak all of the forms in the past 3 years.
Obstacles	The main obstacle was confusion about how the program works. Strategies were developed for ways to make sure people knew about the program and how to use it.
How Obstacles were Overcome	KPMG has overcome the initial confusion through ongoing communication between HR & the Business Partners who were negotiating for some of their employees who wanted to use it.
Benefits	There are many benefits to the program, including the following. • It frequently allows KPMG to retain an employee it would otherwise lose. • It encourages the team to work together to determine how they can best meet the needs of the client across the board in a really equitable way for the firm. • It is believed to have a positive return on investment. • It reduces resentment. • It provides a process for making expectations clear for manager, employee, and team. • It gives clients better continuity of service.

Measurement	KPMG tracks utilization rates, but believe they are under-reported. There are additional data sources in the form of employee survey data, anecdotal data, real-life examples, and testimonials.
Factors in Success	The main success factors are: • the program fills the need, and • many senior leaders support it and actively try to promote it.
Manager Comments	• The role of the person will dictate whether flexible arrangements will work • Organization culture is important. It needs to be part of the way we structure our teams. *-- Chad Seiler, Director of Transaction Services*
Employee Comments	"People are attempting to achieve their goals in life. These people inspire others. With this program their choices can be realized." *-- Kaoruko Margeson, Para-Professional*
Recommendations	• Make sure it fits with current culture & business needs. • Look at it as a "solution to a business problem."
Another Program of Interest	Informal Daily Flex: KPMG promotes a culture of flexibility, daily flex as well as formal AWA (Alternative Work Arrangements). The staff is primarily made up of professionals, most of whom take advantage of daily flex. In this case there is no formal documentation and no formal request process. Employees can use it to attend a child's play, coach little league, or pursue other interests/responsibilities outside of work. They work it out with their Performance Manager (immediate supervisor) or their Engagement Partner (the person in charge of the engagement they are working on), to define how they will get the work done. In the rare issues when people take too much time, it is considered a performance issue not a flexibility issue.
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Program	
Description	In the 1980s AT&T introduced a policy that allowed active management and occupational employees to work less than a standard work week on a regular basis, if their workload and the needs of the business could be accommodated. Lucent spun off from AT&T in 1996 and adopted the same policy.
Administration	This policy is owned by the compensation team and managed at the local level. Employees familiarize themselves with the policy and the impact on their wage and benefit packages, and then develop a work-plan that they can discuss with their managers to determine whether working a part-time schedule would be feasible for the type of work they do and in their specific 2.07 6 spa the pow[(In ussthe poffo (fic) pa2sthe ./F1 y o t8l9Htai mt:gCathe ./F1nthe sao/1
Drivers – Why Developed	It is believed that the policy was originally introduced at AT&T to help recruit telephone operators to cover all of the various 24 hour, 7 day shifts. These positions were staffed primarily by women and this policy helped with recruiting and staffing, particularly of split shifts. Although Lucent no longer has operator services, the policy has been retained. The use of flexible work arrangements has continued in an effort to help

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Benefits

The primary benefits are:

- improved productivity,
- reduced absenteeism,
- increased employee loyalty and commitment,
- ability to adjust workload in peak periods,
- improved perceptions of the company as a flexible company,
- improved employee retention,
- ability to recruit more talented individuals,
- increased opportunity for employees to better balance their work responsibilities with their needs outside of work.

Measurement

Lucent can determine how many individuals are working part-time, but does not actively track it. Approximately 1% of the U.S. population is currently working part-time.

In the most recent employee survey, 72% of employees agreed that their manager was sensitive to work/life balance. That was a 2% increase compared to the same question on the 2005 survey.

Factors in Success

There are two main success factors. The first is the long history of having the part-time policy. The second is the flexibility of keeping the decision and approval to implement a part time arrangement at the manager/supervisor level, eliminating a lot of bureaucracy.

Manager Comments

"My personal experience was -- when I had this person reporting to me -- you're used to being able to -- I'm very used to knowing -- I need something by this date or by tomorrow, and if they're not always here, and I have to wait -- that was something that I had to get used to and proactively manage."

"My experience has been that people will work hard for you. It's really kind of a give and take. So, if they need this to support their personal lives, and you support them doing it, I think that they give back and will meet whatever deliverables are necessary."

"...it's been an interesting experience here at Lucent where we had a CIO, a former CIO, who was very strongly opposed to telecommuting, and I think that there's a significant employee benefit to allowing a certain amount of that. It became a real employee satisfaction factor in our work environment here."

-- Caroline Wills, Director of IT Business Operations,

"When we merged, we all had to take this web-based diversity class -- interestingly, we're all kind of moaning and groaning about it because we think it's going to talk about our ethnic background, our sexual orientation -- and here we go with another one of these things. So, one of the sections, although it was brief, it was a mother who was talking to her male boss. And her male boss says – 'you know there are some people who are complaining because you think of it as liberal with the, you know, working from home policy, and we might have to address that people are thinking you're getting preferential treatment'. And the mother worker responds -- 'have I ever missed a deadline'. He says no. 'Have I ever been unavailable'? No. 'Is my work still exemplary'? He says yes. And her response is -- 'what's the problem'? And that's the end of the segment. And actually I ran down to [my boss] and I said – 'you've got to see this. You've got to see this'. That was the first time I had seen mothers as a group of people that we had to understand their diversity -- we had to understand that their needs are different."

-- Elisa Ingram, Project Manager

Recommendations

The HR manager suggests that utilization of part time employment could be improved by instituting a headcount policy that is supportive of part-time and other flexible work arrangement options. Another observation is to ensure your systems (payroll, benefits, etc) support part-time work and are automated. Otherwise, it could be an extremely manual process.

The employee interviewed recommends this program, as long as it works both

Program	
Description	The GSK part-time sales force is not a broad-based company program, but is instead a work approach that was adopted to meet the needs of a particular business. In 1993 GSK acquired a 'prime time sales force' from Marion Merrill Dow Pharmaceuticals. The sales force was primarily composed of working mothers and retired pharmaceutical professionals. As GSK expanded its consumer product sales, they have continued to support this part-time sales force. The sales representatives generally work 25 hours a week calling on physicians and explaining GSK's products to them. There are 198 sales representatives who do this and 90% of them are part time. A few work full time because their territory has a higher concentration of physicians. 85% of the sales force is women between the ages of 28 and 40, and the majority of them are working mothers who had previous experience as a pharmaceutical sales representative. They are able to get their children off to school, call on a number of doctors during the day, and be home when the kids are home sick or when there are special school functions. They can work whatever 25 hours that they want. They all have full benefits: medical, dental, life insurance, pension, 401K, car insurance.
Administration	People are hired into this professional sales force and can work part-time if it makes sense for their territory. The sales force operates under performance-based expectations delineated by GSK.
Drivers – Why Developed	The company wanted to recruit qualified people who were willing to work part-time, and who were able to reach the physician market effectively. At the time there were a lot of women leaving the work force to raise their families. This approach was a way to attract them into a job that would benefit the company and the employees as well. They also targeted retired people with a pharmaceutical background.
Implementation Approach	There was no special implementation at GSK. The sales force was initially inherited from another company and has evolved since.
Obstacles	There have been a few obstacles to this effort. Budget considerations, primarily which brands would fund how much of the sales efforts, have been obstacles in the past. Recently, Consumer Healthcare has been re-structured in order to work more effectively and cost efficiently. As new managers have been brought on board they have needed to be educated as to how it works.

Benefits	The company gets an effective sales force at a lower cost than a full-time sales force. It is a relatively small sales force that can literally turn on a dime from calling on doctors and pharmacists, to providing community service on smoking cessation, to helping launch new products, as well as promoting the switch of pharmaceutical products to OTC (over the counter). The biggest benefit for the employees is the flexible working hours. It is relatively easy to attract working mothers who need to be home in the morning and home in the afternoon, and also people who have retired from corporate America but still want to work.
Measurement	GSK has data regarding the make-up of this professional sales force, and also

Recommendations	If your company has a similar business need, this is a great idea. Don't look at these employees as part-timers, but sales people who just happen to work part-time.
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Job-Sharing

1. TAP Pharmaceuticals: Field Sales Representatives
2. Hewlett-Packard

Program	
Description	In 2001 TAP introduced a job sharing program for its field sales employees in which two employees share one fulltime sales representative position. Employees interested in the program must be regular fulltime employees who are performing at a "fully meets" level, which "represents performance that is fully acceptable and consistently meets job standards, including both business and organization results." In order for an employee to be accepted into the program, he or she must be skilled in sales work, be effective working in a team environment, have strong communications skills and be open to accepting equal responsibility for accomplishments and failures. Job share partners are able to keep their company cars, computers and company phones. Employees interested in the program informally attempt to find a job share partner in their geographic area. Once two employees in a geographic area are interested in the program, they create a proposal that indicates how the work will be shared.
Administration	Employees complete the necessary paperwork and submit it to their manager for review, modification and approval. The proposal must also be approved by the employees' manager's manager and the sales director. If it is approved at all levels, the job share arrangement is entered into the HR system and the first level manager creates a job share arrangement document that outlines in detail the specifics of the arrangement. The company limits the number of job sharing arrangements to one per district.
Implementation	TAP started the program with several pilots in the field, and then modified it before rolling it out more broadly. After the pilot program, there was a formal roll-out that included a brochure, training classes, conference calls and an educational session for managers.
Drivers – Why Developed	TAP has a large number of employees starting families. TAP decided to offer this program as a strategy for retaining a high percentage of workers in this life stage.
Obstacles	The biggest obstacle was concern from managers that many employees would want to participate in the job share program. Another obstacle was the additional work needed to manage two people in a position rather than one.
How Obstacles were Overcome	Managers learned very quickly that their fears were unwarranted. Not all jobs are suited for this type of program and not all people are suited for this type of arrangement.

Employee Comments

"We both have separate performance reviews, but we decided that it really din't make sense to have separate goals because we are both involved in all the projects we work on."

"It was quite tough for me when I first started because I had been in the position for two years before I went to a job share. So as far as responsibilities, I found myself still wanting to contribute at that fulltime level because I had a lot invested in the position that I was in fulltime."

"I think that it helps as far as a work/life balance perspective when TAP shows that it's flexible and that it cares about employees, which can ultimately increase productivity, and make people feel more engaged in the work that they're doing. It also has helped the position by bringing different perspectives to the communications we produce."

-- Debbie Jensen, HR Communications Manager, Corporate Office Job Share

Recommendations – HR

It's not easy to get a program like this off the ground. You really need management buy-in, guidelines and the company needs to invest in the effort. It can take years to establish a successful program.

Recommendations – Manager

Start a program on a pilot basis so that you can see what issues are germane and particular to your organizations. What are the challenges? What are the things that you want to include? TAP has an agreement signed by both job share parties that outlines each of their responsibilities, the days they will be working, what accountabilities they have. These agreements should be reviewed on an ongoing basis to make sure that there is clear communication regarding expectations between employees, managers and HR. Either party in a job share or the organization can opt out of the arrangement based on what the business needs are for the organization or the circumstances are for the individuals. If an employee decides that he or she wants to go back to fulltime they can.

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Administration

Employees have to submit a form to their manager for approval of teleworking arrangements. That form goes into a global HR managing system. There are fields on the system for teleworker code and teleworker address. Reports can be done that show the number of teleworkers around the world. Employees are also eligible for reimbursement of certain home office expenses.

Job sharing arrangements are not tracked on this system. Job share partners create a plan that defines how the business arrangements will work, and it is

Manager Comments regarding Job Sharing

"So it does need to be one where the position enables it, you have the support of the manager, but also that you've got the manager feeling comfortable with the two individuals who are proposing to start a job share. Do they balance each other? Do they have the right skill sets for that particular position? Is there comfort in how they're going to manage this? Because the key importance here is that, for a job share, at the end of the day almost becomes invisible to the organization, meaning it is not up to the organization to accommodate the fact that you've got two people in a job."

"You don't necessarily want two people who look exactly the same on paper. The true advantage is that you can bring people with different skill sets that are going to work well together."

"The benefit that I'm not sure people really think about which is huge to me, is in a job share, there's always someone around, meaning they never go on vacation at the same time."

-- Michael Bordoni, Vice President of Finance for the Americas Region Imaging and Printing Business

Employee Comments regarding Job Sharing

"The complementariness of our strengths [makes us stronger]. She is a CPA, so she was an auditor, has very technical accounting knowledge, and I am an MBA, so more like the vision, strategy, building nice pictures of the future, and all those things. So together, we have that difference, or equivalent of one CPA plus one MBA, the experience of both together, and very powerful insight."

"We have gotten three promotions together while job sharing."

"We are just both so focused and dedicated to doing a great job, that we just work a lot, and the output is really great. It is better than what each one of us could do [individually]".

-- Marie Zoppis, Senior Director of Finance, Imaging and Printing Business

Recommendations

Survey your employees to see exactly what their needs are and what they are looking for; and see whether the flexible work arrangements are meeting their needs.

Always work at the top. Always get approval at the top, and have someone champion it from the top. Otherwise, it may not go anywhere.

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Teleworking

- **Booz Allen Hamilton**
- **Eli Lilly & Company**
- **Dell: Virtual Call Centers**
- **Hewlett-Packard**
  (see Job-Sharing section for Hewlett-Packard teleworking case summary)

Program	
Description	The teleworking program provides employees an opportunity to work in a location, other than their official Booz Allen office or client facility. Teleworking can occur on a full-time, part-time, or part-day basis. Employees are strongly encouraged to have worked at Booz Allen for at least 2 years before applying; however, exceptions can be made with approval from the manager. Employees are responsible for establishing an appropriate work environment in their home and are typically responsible for the costs associated with the set up and maintenance of their home office.
Administration	In order to participate, employees are required to complete a form that is reviewed and approved by their manager, someone at the principal level, and sometimes someone at the officer level as well. Prior to the approval, it must be determined that the FWA is beneficial to the firm as well as the employee. Employees complete the form with their manager and with an HR representative. The HR representative will review the request to ensure employee eligibility and consistency with the policy. Employees also may request confidential advice and counsel from their HR Representative before making a formal request. Once the form is approved it is entered into the data management system for tracking. The Work/Life Program office is responsible for reviewing flexible work arrangements processed and tracked in the data management system, and for reviewing telework hours tracked in the time reporting system. If FWA patterns--such as a staff member who is not listed as a teleworker recording telework hours every Friday--are observed, the HR Representative and Work/Life Program office will conduct additional research and may ask him or her to complete a FWA request form. Managers formally review the flexible work arrangement with their employee after the first 60 days, and thereafter, in conjunction with the employee's scheduled performance assessment period. However, the arrangement can be reviewed at any time to determine whether it is working successfully or not.
Drivers – Why Developed	In creating this program, Booz Allen wanted to provide an additional flexibility option to employees and formally address teleworking in its Flexible Work Arrangement policy.
Implementation Approach	Booz Allen's Total Rewards Team led the implementation effort with employee involvement on many levels. The program was socialized (reviewed and discussed) with many different teams within the firm. They got their buy-in, identified issues, and identified different perspectives. A very thorough process was used to make sure the program was socialized and that all of the recommendations and input were considered.

Five core teams of 100-400 people each were identified to pilot the program. These core teams were supporters of flexible work arrangements and teleworking. The core teams of managers, employees, and staff members were asked to test the policy and also to help test the tracking mechanisms for the policy. After a 6-month pilot period, HR gathered feedback and assessed it, determining changes needed to be made, or if the draft policy needed to be modified. Any necessary changes were made, leadership gave its approval, and then there was a full scale roll-out that included a communications campaign.

The new policy was communicated via e-mail, directing people to the HR intranet site for the policy, guidelines, and additional information, and to the time reporting system for frequently asked questions and guidelines pertaining to recording non telework and telework hours. A telework mailbox was established to answer any further questions from staff and their managers.

Obstacles

Some of the biggest obstacles to this program were:

- Receiving consensus to guidelines around the definition of base office location and travel expense reimbursement.
- Managers' initial hesitancy around how to implement the program. Did it mean that everyone had access to teleworking if they asked for it? How could they say no? How were they supposed to manage individuals who were not located in the same location as they were?

How Obstacles were Overcome

Obstacles were addressed by the following actions:

- Guidelines were established that left some decisions to managers' discretion.
- Training, guidelines, and "questions to ask" were provided to managers to address their concerns.

Benefits

Some of the benefits of Booz Allen's teleworking program are that it:

- Demonstrates that the firm really does value its employees by giving them the flexibility that they need--both informal and formal teleworking opportunities.
- Demonstrates that Booz Allen is being proactive in addressing environmental issues by decreasing the number of commuters to its offices.
- Helps instill Booz Allen as an employer of choice by enhancing both recruitment and retention.
- Increases productivity in staff because they feel valued and trusted, and because they spend little or no time commuting.
- Helps staff balance their work responsibilities and personal commitments more effectively, reduces commuting time, and increases morale.
- Helps Booz Allen, as a global firm, conduct business across many time zones, from Hawaii to London.

Measurement

Both the number of people in the program and the number of telework hours are tracked. The time recording system was enhanced to track telework hours. Approximately 54% of the population has participated in a formal or informal telework arrangement. There has been a large increase in utilization over the last 2 years.

Factors in Success

The major factors in making this successful are that:

- The culture at Booz Allen is supportive of the telework program, including the hardware and software resources that are made available to employees.
- There are program champions--senior leaders who communicate and demonstrate their support.

Employee Comments

"It has increased my loyalty to the company both because they are doing something so great for me, it makes you like working there more, but also because, you think, well, what's the alternative if I leave? Could I ever leave this company that's allowing me this kind of flexibility and go to a company that doesn't know me from Adam and wouldn't allow me to do that. That's a lot to give up, in addition to pay and benefits and things like that." "They'd have to offer me a lot more for me to want to leave because of the flexibility that I'm getting here."

"I didn't necessarily want to be a stay-at-home-mom. I like being employed. I like writing. I like doing something and like the income, of course. But, (with the teleworking arrangement that I have), I am able to be both. Technically, you could say I'm a full time stay-at-home-mom. Whenever the kids are here, I'm home. But, I'm also a full time employee and I feel very valued that way so that's nice."

– Beth Mancuso, Marketing and Communications Associate

Recommendations

- Do your research
- Learn the culture of your company.
- When designing your program's policies, definitely socialize the concept and get feedback from many teams and departments because that is very helpful in terms of advising and formulating something that will work well for the firm.

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Program

Description

The teleworking program at Lilly is for employees who do their work full time at home. It does not include people who travel a great deal such as sales representatives or people who work in clinical trials. The company provides ergonomically correct office furniture, a Lilly computer (laptop or desktop), a printer/fax/copier/scanner device, high speed connectivity, and an additional telephone line.

Teleworkers receive a full day of training that includes technical training (equipment, software, etc.) and a half day of training with their direct supervisor discussing communication, performance management, team meetings, how to get in touch with each other, how]TJu5Sgsy wantw tohrav hon-on-onegs,

Obstacles

There were two main obstacles to the program:

- Supervisors did not believe they could effectively manage employees if they could not see them working.
- IT was not set up to properly support the program at the time. The IT organization did not see the benefit of providing a focal point to own all the IT issues. It took some time for the IT organization to understand and be able to support the additional IT requirements of individuals

Program	
Description	At Dell, employees can apply to work in Virtual Call Centers. All of the job requirements, policies, pay and benefits are the same as working in a regular call center, except that the employees work from home. They need to meet some additional criteria including the ability to work effectively without a lot of management involvement, to be a self-starter, and to show that they will not have too many family distractions. When they work at home, they maintain the same schedule as if they were at work, including breaks.
Administration	Employees complete application forms as if it were a job posting. They explain how they will make the adjustment to working from home and complete a safety checklist for their house. Their families have to sign agreements saying they won't bother the employees while they are working. Employees are then interviewed and selected or not, based on the manager's assessment.
Drivers – Why Developed	About two years ago some executives at Dell read an article indicating that all of Jet Blue's reservation agents work virtually. They did a benchmarking project with AT&T, Boeing, IBM, Jet Blue and other companies who reported productivity gains in the 20% range and savings on facility costs. These executives arranged for a pilot of a similar program at Dell and it worked reasonably well. Productivity was enhanced and there were savings on facility costs. Employee retention showed to be a big benefit as well.
Implementation Approach	After the initial 6-month pilot program, they evaluated the impact of the program and then began launching additional virtual call centers at various company sites in North America. Each site started with a fairly small group of fifteen or so and then added additional groups in small increments. There are currently nearly 500 virtual call center agents working at five different company sites. Implementation across the various sites has been coordinated by one "Work-from-Home" Program Manager. Initially there was a central core team composed of one Telecom Engineer, an IT Support person, an IT Project Manager and an HR person to resolve issues. As they move from site to site, there is a core team at each site that supports the implementation. In addition to recruiting in-house people, Dell has also partnered with the U.S. Army Spouse Employment Program to recruit and hire Army spouses of the company's deployed soldiers. There is often a shortage of jobs near military bases, so this is a good source of labor. Employees can also move to different

Obstacles

Some of the obstacles encountered were the following:

- management resistance to the new paradigm of working from home;
- acquisition of the right technology to allow people to work effectively from home;
- getting management approval for the additional hardware (notebook computer) costs;
- resolving legal concerns about security and privacy;
- helping work-from-home employees feel part of the Dell culture.

How Obstacles were Overcome

The implementation team worked to resolve technical issues as quickly as possible. Management resistance was overcome by focusing on the benefits to Dell and telling the managers about the experiences of the benchmark companies. They also explored scenarios with them – “How do you know if someone is really working?” As they thought about this they realized that reviewing the data was more effective than watching them in person. Managers were also allowed to determine whether employees were qualified to work at home or not.

One of the methods used to keep employees part of the Dell culture is to rotate groups every week or so. One week they are working from home and the next week they are at the office. In situations where employees are working fully from home, employees are expected to come into the work site at least once per month.

Benefits

Dell has seen the following benefits from this program.

- Productivity has increased.
- Employee retention has improved significantly.
- “Resolve Rates” for client problems have increased; “Escalation Rates” have decreased.
- Facility costs have been reduced.

Factors in Success There was a great deal of thought put into the processes and policies support-

On and Off-Ramp Programs

- **Deloitte & Touche: Personal Pursuits Program**
- **Intel: New Parent Reintegration**
- **MITRE: Phased Retirement**

Program	
Description	The purpose of the Personal Pursuits Program is to remain connected with individuals who resign from the firm, generally to take care of children or sometimes elders. For those who need to remain certified as CPAs, the program helps them get the needed continuing education. Participants in the program have access to the organization's learning center and virtual learning center. The program also helps them to maintain their business networks. Deloitte has found that one of the things that falls apart for people, and why they perhaps don't come back after an extended time away from the firm, is that they lose their business contact network. Participants in the program choose a mentor within the company who helps them stay connected. If participants want to do some part-time work, they can do it with Deloitte but they are not allowed to work with anyone else. Deloitte generally has such ongoing talent needs that they don't have any problem bringing these employees back into the organization. In selecting people for the program, the company looks for people who are satisfactory performers and have a truly sincere wish to return to the firm. They need to return within 1-5 years.
Administration	The program is administered by a person in the national benefits group who is the contact person on procedural matters. Deloitte has assigned a Career Coach within its internal career consulting function (Deloitte Career Connections) to champion this program. She will stay in touch with mentors and with people who are in the program.
Drivers – Why Developed	The Personal Pursuits Program was developed for the following reasons. • The company has an investment in the people which it wants to recoup. If people leave and then come back, the company recovers at least $150,000 in costs. • The demographic facts of the next generation will make it harder to recruit good people.
Implementation Approach	There was an initial pilot program through the company's Women's Initiative. They worked with the human resource function and regional HR leaders to identify people who had left the firm that would be good candidates for the program. People were asked if they would be interested in this program, and about 18 to 20 were identified for participation.

Those who agreed to participate were assigned mentors and started in the program. Initially there was some difficulty getting the company intranet clearance for these 18 to 20 individuals, and there was a little bit of a hiatus in order to get the needed organizational cooperation. At the conclusion of the pilot, participants were interviewed to determine what was working and what was not. In some cases there was difficulty with the mentors; participants wanted the mentors to be a bit more active with them. Once people are at home with children or elders, there is a feeling of "out of sight, out of mind" on both sides.

After the pilot, the program was rolled out to the company as a whole. At least one person who participated in the pilot came back to work at the company after about 15 months.

Obstacles

The biggest obstacles encountered have been as follows:

- Gaining access to the intranet for people who have left the company required work from multiple organizations.
- In some cases people don't believe that the organization is telling the truth when it says it wants people to stay in touch and come back to work.
- Deloitte has so many things to offer and so many competing demands on people's time, that it is hard to keep this at the top of people's consciousness.

How Obstacles were Overcome

When obstacles were encountered, the leaders of the program presented the business case. It was pointed out that the cost to the company of losing someone is twice their salary.

Benefits

The benefits of the program are as follows.

- It shows that the organization is serious about flexibility and choice, which is a very critical thing that people are looking for.
- It shows that Deloitte values people and is willing to go the extra mile to keep them connected and give them "on and off ramps".
- Former employees keep their business contacts and they have a facilitated way to get their certifications.
- The program is cost effective.

Measurement

The number of people in the program is tracked. There are currently about 46 participants. About 1 additional applicant per month. It is hard to know what the number should be.

Factors in Success

The main success factors are as follows.

- It is a very sound program that meets the business need.
- The program was initiated by top management.

Manager Comments

"[My first reaction to this program] was very positive -- very positive. Once we've had someone internal that we've trained for that many years and who knows how our system works, and we know that they're good, and they know the clients, and they know the people, we really like to retain them. So if there's any way we can get them to come back when they've had to leave, then something like this that would help us is a great thing."

"Hopefully they do return to the firm. And really even if they don't, hopefully they retain a positive sense about the firm, and even if they don't come back to us for whatever reason, they still will be loyal alumni, and that's always a really good thing to have."

– Julie Keeney, Senior Manager

Employee Comments

"I would say the program is fantastic, to begin with. But, basically, the easiest way to describe it is it's like a sabbatical. It's unpaid, but for up to five years, I can still be associated with Deloitte. They will pay for my CPA license, my continuing education and my AICPA membership or any other memberships that I have relating to being a CPA. Additionally, I can attend national training, if I'd like to for my continuing education, and I can also go to offices and still be included as part of the office or as part of the firm without actually being employed. And then the theory is, whatever timeframe, up to five years, would be that I would go back. I am not legally required to go back, and they are not legally required to take me back. But the purpose is to keep me affiliated with the firm and my CPA license and everything current and my skills current, or as current as they can be when you're not working."

"The support and encouragement I got to do it definitely increased my love of the firm or however you want to say it. I definitely was very appreciative of Deloitte doing that. It was a very hard decision to quit, although I knew that I really didn't have an option, since I was going to be moving so far, but I really loved my job, and I loved the San Diego office, and they were so supportive and so encouraging of me doing it, stay connected and want me back if and when we moved back to San Diego or anywhere else there's a Deloitte. So this program definitely increased my loyalty to the firm."

– Tina Swenson, formerly Tax Manager, Deloitte & Touche

Recommendations

If there is no identified top-down champion for a program, it can open the doors for a work-life advocate to get into various levels of the organization that really do the work. It is very important to pick a leader and to help them have the vision.

In the work-life role you can't be seen as a zealot or some hopelessly touchy-feely type. You have to be seen as a business person who has some compassion about people's difficulties, who ultimately helps give people tools to achieve the flexibility and choices they need.

Another Program of Interest	Another interesting program at Deloitte is a reduced work arrangement program where participants actually reduce their hours. As long as they have 60 percent or more of a normal schedule, they can continue on a promotion track, albeit at a slower level than if they were 100 percent. Participants are still eligible for promotion and 100 percent of benefits, and are still eligible to accrue vacation time.
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Program	
Description	The purpose of the New Parent Reintegration program is to provide a smooth, planned transition back into the work force after either a pregnancy leave or a parental leave. The program allows up to a year of integration time following the end of a leave period where employees can do a number of different things, at the discretion of the employee and the manager. The employee can work part time on a temporary basis, whether it is six months or the full twelve months. If he or she needs more flexibility in the way the schedule is structured, whether it's a different start or stop time, or a different configuration of the days themselves, the program allows for these types of accommodations.
Administration	In most of Intel's flexible work arrangements, an individual employee works with his or her first line manager to negotiate a specific solution for the specific situation. There is not a lot of tracking of flexibility arrangements at a corporate level. There is no corporate database and no formal approval process. The company does not want to introduce these elements of inflexibility into its flexibility programs. Basically the administration is carried out by the employee and the manager.
Drivers – Why Developed	Intel was responding to some issues that came out of some targeted surveys and studies that related to the retention of women. Intel found that many employees (predominately new mothers) were having a hard time coming back from leave. It was difficult to go from being one hundred percent on leave to one hundred percent back at work, and there was not a lot of middle ground between those two. Having such a program was one of the ideas that surfaced that employees felt would make a difference.
Implementation Approach	The New Parent Reintegration Program was first created in Israel with sponsorship by the General Manager of the factory there. It was also piloted in the IT organization and the HR organization. At the corporate level there was some re-organization going on at the time. Instead of doing a big roll out that might be seen as being in conflict with the corporate messages at that time, they opted for a quieter approach. They got the message out to the necessary people through some of the big stakeholder groups and employee groups: the women's network, the parents' network and the work life network.
Obstacles	The biggest obstacle was how to communicate this program, how to strike a balance between being really directive on one side and trying to empower discussion and dialogue on the other side. The company needed to find that right balance between ing ak0 TD dare the ways that you can use it without having it seem like those are the only ways that you can do it.

How Obstacles were Overcome

Generally the corporate policies are fairly open-ended and contain examples rather than requirements. Sometimes the businesses may add additional rules or guidelines.

Benefits

The main benefits of the various flexibility programs are as follows.

- They improve productivity.
- They increase engagement and retention.
- There is an intrinsic value in doing this because it is the right thing to do. The program says a lot about commitment as an organization, that you really do value and trust your people in making good decisions and being responsible for their own work and their own time.

Measurement

In general, utilization rates are not tracked for the various programs. In the U.S. about 20% of workers (primarily factory workers) are on a compressed workweek. Less than 1% of employees work part-time. These are the two programs where utilization rates are tracked.

Factors in Success

The main factors in overall success have been:

- persistence
- consistent messaging
- senior management involvement and support
- visibility of the program
- flexibility in the approach.

Manager Comments

"Become as familiar with the program as you can. Read every guideline. Make sure you understand what it is before you say 'yes or no'. And then leave it up to the employee to figure out how it's going to work. Don't try and get the solution yourself, because you probably don't understand everything about what the employee wants. Let them come up with the solution. And then tweak it as needed to meet business needs, but put the onus on the employee to figure out how it's going to work. And then you make a decision from there."

– Joe Watkins, Engineering Manager

Employee Comments

"The challenge with my old group was the reason I left. I was disheartened. I was there for 5 years, and was really frustrated [that they couldn't make a flexible work arrangement work]. I have the complete opposite experience with the current job. I'm not treated as second class. I like to tell about the current solution and communicating it. It's very dependent on the team and manager. The job wasn't the best fit as well. The initial response to my request was a clear indicator."

– Lisa Depew, Technical Marketing Engineer

Recommendations

One recommendation is to have flexibility in your approach similar to what has been done at Intel. Don't be obsessed over what other companies are doing. It really has to be driven internally first, in terms of what are the right programs and guidelines. You really need to have a commitment to do it. If it is just a surface level commitment, no philosophical emphasis on any of this, then you are better off not doing it at all.

You need to have one or more people whose formal job is managing these programs. There needs to be some organized concerted effort if you really want it to take hold.

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Measurement

At any given time there are approximately 12 employees participating in this phased retirement program. This is less than 1% of the MITRE employees.

The company also collects employee survey feedback on its work-life programs. For the question "my company encourages work life balance", MITRE received a 90% favorable approval rating, 10% above the average of the other 99 companies that made the Fortune listing.

In the Computer World listings for the question "I am able to balance my work and personal obligations" MITRE had a 92% favorable approval, 22% above the average of the Computer World listed companies.

Factors in Success

The main success factors have been low program cost, and ease of administration. It has gained in importance as the maturing work force has become a more important issue in society and in the company.

Manager Comments

"I think it's important for the employee to feel like they have the maximum flexibility we can give them to balance work life in a way that is positive for both work and life. We know what it's like to have people burn out. We know what it's like to have people feel underutilized. As long as I, as a manager, feel that the employee is trying to do the best by the work needs as well as be realistic about their other commitments, then I'm supportive."

"My personal experience is that we're finding that engineers and researchers are productive and interested in being productive much longer than, for example, government retirement ages. We have a slightly different situation at MITRE as opposed to a lot of the for-profit world in that we're trying to not only maintain unique expertise, experience and just knowledge of specific programs, but also security clearances. So, we have lots and lots of motivation to be flexible -- I can't think of any negative examples where we've offered somebody flexibility and it came back to cause a problem."

– Erik Hughes, Department Head and Senior Principal Staff

Employee Comments

"For people that select this phased retirement, I think it helps ease them into retirement on a gradual basis rather than have this be, you know, an all or nothing proposition. You're breaking your neck at work one month and then the next month, you're retired cold turkey. For me, that's just not the approach that I wanted to take."

"I think it's boosted my opinion of MITRE even higher than it was."

– Joe Wood, Principal Engineer

Recommendations

The biggest challenge is to offer employees a program that allows them to work part time and have access to retirement funds. Given today's rules, there needs to be some sort of defined contribution retirement plan to facilitate this.

Consider surveying employees to see if there is a need before a whole lot of work is performed.

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Alternative Work Schedules

- **Raytheon: 9/80 Work Schedule**

Program	
Description	All salaried employees at Raytheon Missile Systems are strongly encouraged to participate in the following two week schedule: Week 1: Monday - Thursday 9 hrs/day; Friday 8 hours Week 2: Monday - Thursday 9 hrs/day; Friday off Employees can opt out if there are extenuating circumstances. There are actually two different schedules A and B which have different Fridays off. Hourly employees are unionized and have consistently rejected the 9/80 work schedule.
Administration	There is a written policy that describes the program and the options. Employees are put on one of the schedules and then tracked using time cards.
Drivers – Why Developed	The company President Louise Francesconi initiated it in 1997 to: • boost recruiting efforts, particularly at colleges, and to • retain good employees.
Implementation Approach	HR formed a cross functional team with various players who might be affected by it, and came up with this schedule. It took a lot of research to see who was doing it and who was doing it effectively. How did they deal with holidays and people who couldn't make it work? How did they deal with people who needed to be supervised who worked on the different schedules? It took months to really come up with a workable model. Then it was rolled out to all the salaried employees at once.
Obstacles	There were a number of obstacles to be overcome. • The new schedule was a big change for people.

Benefits

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Linked Business Results and Flexibility

- **American Airlines: BOLD Initiative**
- **Best Buy: Results-Only Work Environment (ROWE)**

Program

Description The BOLD Initiative strives to improve productivity and teamwork while provid-

Obstacles

Some of the obstacles they have faced in implementing this program include the following:

- cultural interests and past history;
- apprehension around being accountable for results without having the same face-to-face access to people as in the past;
- flexibility options for one team that another team doesn't have;
- the sense that people are too busy already, and can't take on more aggressive goals;
- lack of team orientation of some groups - where employees are more likely to work as individuals;
- lack of trust among team members; and
- conflicts with existing policies.

Overcoming

American Airlines has done the following to overcome the obstacles that

Factors in Success

Some of the factors that are helping this succeed include:

- the marriage between helping the company with productivity and providing flexible arrangements for employees;
- the fact that it is a team-based approach, where teams figure things out for themselves.

Manager Comments

"(When I first heard about this program) I was thrilled. I thought it was spot on. It was right on. I have seen phenomenal results. People completely turned around. I actually have in my very first group an employee who was very close to needing disciplinary action because her performance was not meeting those of her peers. And right as this was being introduced, she was included in that group and has excelled and actually will probably be promoted in the next two months because it has completely turned her around. It's the first time she said that she felt that her contributions as an employee have been recognized since the early nineties, which I thought was very interesting."

– Kel Graves, Manager of Onboard Service Finance

Employee Comments

"I feel more responsible now, because we are more of a team. We need to meet our objectives and goals. Whenever I feel that I'm caught up, I try to go and see if there's anything else that the others need to achieve so we are in line. We're more of a team. Because before it was, you do this, you do that, and if you don't do it, we're all going to fail – too bad, that's your problem. Now we're more of a team. The whole objective of everything, it's not you or you, it's us. So we are all responsible. My productivity has increased. I have more time to do audits. At the beginning of the test program, we found a very big mistake, which we took back. We took back about $300,000."

– Carolina Ioannou, Pricing Analyst

Recommendations

- Make sure to meet the needs of your culture, and do not take a cookie cutter approach.
- Make sure that you include productivity or metrics of some sort, with an expectation of continuous improvement with your flexible arrangements, and do it in a team fashion so that you have involvement and endorsement by people.
- Communicate very well up front.
- Start small and let it spread naturally.
- Make sure you have a champion for this in each organization where you implement it.

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Program

Description

A Results-Only Work Environment (ROWE[SM]) enables people to do whatever, whenever they want, as long as they get the work done: "...in the park, in a coffee shop, in the shower. At midnight or 3am or on Sunday. Whenever and wherever."

ROWE is a cultural transformation that "permeates the attitudes and operating

In the **second phase** the rest of the team learns what the results-only philosophy is all about. Facilitators host sessions that focus on eliminating language in the work environment that makes judgments about how other people spend their time. The facilitators refer to this language as "SLUDGE℠". An example of sludge would be the statement "It's only 2:00 p.m. and Fred is leaving again. I wish I had his job."

In this session the team learns what sludge is, how to identify it in the work environment, the types of sludge that exists and how to eradicate it. The company maintains that sludge in the work environment holds people back from being productive. Once a team works on eliminating sludge, the rest of the ele-

Drivers – At the end of 2001 there was an Employer-of-Choice group at Best Buy that had

Not surprisingly, the biggest obstacle to this change was management resistance. There was a feeling in many of the people that this was "the flavor of the month" and would not stick. There was some apathy as well. People were afraid. They asked: Does the boss know we are doing this? Is he really all right with it? It was not rolled out in the way that programs were normally implemented, which is top down. Doing it in a top down way would have been counter to what the program was trying to do, which is to get away from the strong hierarchy and empower the workers to achieve the results.

There were also many policies that needed to change to be consistent with the ROWE philosophy: work hours, lunch breaks, absenteeism, paid-time-off. These changes were difficult to make while part of the organization was still operating in a traditional way.

How Obstacles were Overcome

The "pull" method used for implementation helped significantly with the issue of management resistance. A few teams at the beginning were willing to make this change and the positive results they achieved were communicated, and that helped reduce the resistance. Workers who were not participating began to give clear indication to their leaders that they wanted to participate. Ultimately those voices became stronger and stronger, and the leaders had to listen. The resistance was used in a positive way to get more of the population going through the migration. The people created the management tension, not the facilitators.

There were some leaders who simply refused to do it. The facilitators would tell them that they did not have to do it. That was one of the big benefits of the pull approach. Many of the managers who were initially resistant to the approach are gradually coming around as well.

New managers who join the organization often have some initial misgivings about ROWE. The employees are so strong now in their convictions that even if a leader expresses some thoughts that go against the philosophy, the employees' first instinct is to educate him or her. They want to educate people who are entering this new culture and they want them to understand why this is so good for business.

Benefits

Some of the most important benefits of ROWE are the following:

- Increased productivity
- Reduced voluntary turnover
- Increased employee engagement and loyalty
- Improvement in business results
- Every employee can achieve work/life balance – live the life they want and have a job they enjoy
- Both managers and employees are very focused on results and measuring them effectively – that is critical for ROWE to work
- Managers and employees have more frequent "touch-base" conversations

to talk about progress they are making to reach their goals
- Return on investment of the program is substantial
- The company has become a magnet for talent because it so completely differentiated from other organizations
- Managers enjoy their jobs more; they can focus on results and feel good about their approach to working with their staff
- Everyone becomes more customer-focused, trying to figure out how best to help one another
- The company culture becomes more efficient, effective, focused, inclusive, and it becomes happier as well
- External perceptions of the company improve; the company is viewed as a progressive innovative company that unleashes peoples' talents

Measurement

Best Buy tracks the number of people who are participating in the program. Currently about 75% of the people in the corporate office are using it. The company hopes to be at 100% by the summer of 2008. They also hope to introduce it in company stores next year.

Cultural audit information is used to track the cultural change that is occurring and measure productivity gains. Some of the HR measures such as voluntary turnover are reviewed periodically to see what impact the program is having. There is also a regular employee engagement survey that provides a great deal of feedback on the ROWE program.

About two years ago members of the University of Minnesota Sociology Department became aware of the ROWE migration at Best Buy and have been doing surveys with the population. They have been shadowing employees in ROWE teams and non-ROWE teams. They have been observing all migrations in order to show the impact of a Results-Only Work Environment on employees' health and well being as well as that of their families.

Factors in Success

The main factors in the success of this program have been the following.

- The employees of Best Buy have worked through many issues to get to this point. It took a lot of courage to stand up to their leaders and tell them what was needed. They just kept fighting for ROWE in the face of significant resistance.
- The two lead facilitators (Cali Ressler and Jody Thompson) have shown a lot of resilience.
- There have been some very strong supporters from the top leadership team.

Implementation of Flexible Work Arrangements

- Takeda: Work Paths
- Baxter Healthcare: Alternative Work Arrangements Proposal Kit
- PricewaterhouseCoopers: FWA Database
- IBM: Flexible Work Options - New Communications Strategy
- AstraZeneca: New Approach for Flexible Work Arrangements

	The Work Paths program was broadly communicated, including an e-mail from the President of the company announcing the program. Most of the managers (about 87%) were trained as to how to manage flexibility. There were brochures and posters and all of the information was available on the web-site. There were also optional sessions for employees where they could get their questions answered.
Drivers – Why Developed	Takeda is a young company, and one of the early initiatives that the leadership team went through was a process of articulating the company's values. The president at the time had a vision for what the company should be like and felt that respecting people's personal priorities and valuing each individual was very important. Developing the company's values was a very powerful process involving focus groups with every single employee. These values became the foundation for work-life at Takeda.
Obstacles	Some of the main obstacles were: • management resistance in some areas, • lack of trust, • managing by face time, • poor experiences with flexible work arrangements in the past.
How Obstacles were Overcome	There was more management trepidation than expected given the overall commitment and values of the company. Many managers were simply not used to working this way. There was a concern that if you give people different options for work, there can be a negative impact on productivity. They needed to really understand what the program was and what the intent was, and that this was a business strategy, not a perk. There was not really a strong individual champion for the program other than the VP of HR who kept it front and center. There was overall executive support for it. The obstacles were largely overcome through training.
Benefits	The main benefits of the programs are: • employee satisfaction, • improved morale and commitment,

Factors in Success

The main factors in the success of this program have been manager training and organizational commitment. The program is fair to the employees and the company, and it is well integrated with the company's values. The fact that there is a consistent approach across the organization has been helpful as well.

The time spent with the executives was very well spent in order to get alignment and commitment from the executive team. If they had not supported it, the program would not have been successful.

A Takeda manager believes one of the success factors is having regular meetings with your employees on Work Paths (more at first) to check how things are going, gauge co-worker and customer reaction and see if there are any issues that need to be addressed. Do not let issues fester.

Manager Comments

"I thought a lot of people would probably -- I anticipated a lot more requests

Employee Comments

"I would say, just by having happier employees definitely helps, who are more focused and dedicated. You kind of feel that, even though it is a benefit, and it is offered to everybody if they are able to do it, there is an appreciation and a desire to work a little bit more. And I think that is true for other people I know on Work Path, that aren't even part time, people who work from home. It gets them -- it just gives you better work/life balance, which makes it easier to get things done and be happy about doing them."

"As I have told a lot of people, it is hard, the whole becoming a mom thing, and all that. There has to be -- everybody has to do what is best for them; but, for me, I really couldn't ask for a better mix."

– Laurie Webster, Programmer / Analyst

Recommendations

Establishing leadership commitment to the program up front is very important if it's going to be successful. The program should be consistent and administered fairly.

Be sure to provide the necessary training.

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Program

Description

In 1995-1996 Baxter developed an alternative work arrangements proposal kit that included the following:

- a description of the desired flexible work arrangements;
- job requirements and an assessment of impact (e.g. work flow, coverage and the amounts of work);
- interaction with others;
- employee's personal characteristics and how they lend themselves to alternative work arrangements (e.g. ability to work independently);
- handling of sick days, holidays, vacation time, educational assistance, overtime, bonuses, stock options;
- considerations / business parameters for managers in evaluating the proposal; and
- company expectations for communication, continuous improvement and periodic review of the alternative work arrangements.

Baxter has also implemented a job posting system that tells people whether or not alternative work arrangements are available for a specific job.

Administration

- The forms and materials for the program are all on the internet.

- Alternative work arrangements (other than part-time work) are self-reported using People Soft.

Drivers – Why Developed

The programs were developed because of the following factors:

- the Clean Air Act and its requirement to reduce the number of drive alone cars in employee parking lots;
- technology advancements that enabled people to work at an alternate site;
- recognition of work and family needs;
- the requirement to work globally and support customers in very different time zones.

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How Obstacles were Overcome	Obstacles were overcome primarily through education of line managers by HR.
Benefits	Some of the benefits of introducing alternative work arrangements include the following. • "A Vice President once said to me, if you're going to ask an employee to choose between work and family, sometimes they may choose work, but it's not going to last for long. And if you consistently ask them to choose, family will always win. And, they will leave the organization." • Productivity gains due to: A. Reduced distractions B. Better opportunity for collaboration with overseas colleagues (across time zones) when able to work flexible or non-traditional hours. • In order to attract and keep the best people, you need to offer a competitive benefits package. • Employees who are happier in their work are happier in their interactions with their colleagues and their customers.
Measurement	Baxter maintains the following alternative work arrangement measures. • Self-reported utilization of formal alternative work arrangements is about 12-15%, and this is believed to be under-reported. When you add informal flexible work arrangements, utilization is much higher. • Baxter also tracks the % of jobs offered where alternative work arrange-

Program	
Description	PricewaterhouseCoopers uses a standardized database and single process to administer a broad range of flexible work arrangements. Staff members express their needs to their supervisor and complete a comprehensive form online. A central administrator ensures consistency. Arrangements are approved by HR and the Partner supervisor. Any needed changes are made online and go through the same approval process. The database also contains program information and FAQ.
Administration	The program is administered as follows. • A call center fields initial requests. • An FWA team calculates salaries and benefits and manages the database. • An FWA liaison team directs policy and process/database enhancements.
Drivers – Why Developed	In 1998 Pricewaterhouse and Coopers & Lybrand merged bringing together two different policies and approaches. A commf /ocedewd acreewadds In 19,s.butes t arwt arstica

IBM asks employees to assess their need for flexibility, be aware of the options available to them, and the impact that flexible arrangements might have on clients and team. Employees are then asked to submit a formal request for flexibility, understanding that business commitments come first.

Managers also have responsibilities. They need to assess the request fairly considering business objectives and the employee's personal situation, and then work in partnership to find a win/win solution

Drivers – Why Developed

The changing work environment was the major driving force in developing these flexible work arrangements. The needs of the people were not being met by nine to five jobs. It was clear that employees needed flexible work options to balance their work/life needs. IBM knew that happier employees would be more productive and have better work/life balance.

In the past, many of the work/life initiatives started with the Women's Council - women who were mothers, and who wanted some flexibility in their work. Today it encompasses everyone.

Implementation Approach

IBM's Work/Life & Flexibility Department is part of Workforce Diversity. New ideas are developed through employee input, then researched, evaluated, developed into guidance/ policy and implemented through the Work/Life & Flexibility Department.

New Communications Strategy

IBM believes that their flexibility programs are excellent, but they could be used by even more employees. Communication is very important to make people aware of the programs and increase utilization.

As the Flexibility Program Manager, Rena Chenoy 's goal is to make everybody in IBM aware of the work options available to them. There is a need to put more discipline into what has traditionally been an ad hoc communications process. This manager has created a communications plan that defines objectives, identifies the various audiences, and defines strategies and tactics for reaching those audiences. The messages are targeted for different groups: managers, professionals, international employees, etc. Tactics include channels (e.g. intranet site, email), deliverables (e.g. posters, pamphlets) and training (e.g. on-line, classrooms, one-on-one).

There is a calendar for the year that lists the various tactics to be completed by date. For example, in September there is a webcast led by an IBM VP, who will be talking to employees globally about the Work/Life and Flexibility programs.

For every tactic there is a "RACI" chart that defines who is responsible for this item (R), who is accountable for it (A), who needs to be consulted (C), and who needs to be informed (I).

Obstacles	The challenge within IBM is the number of people competing for a limited amount of air time when any type of program is rolled out that is of interest to the employees. For example, at new managers' training school there are many messages new managers need to hear, varying from compensation and benefits, to diversity. The time to deliver these messages is limited and there may not be enough time to spend on work/life issues. So they have to find creative ways of reaching their management population.
Benefits	The program embeds a sense of trust, fairness and equity into the employees, and removes some of those day-to-day inhibiters to work like picking up the kids, getting them to soccer practice etc. From the many employee surveys IBM has executed on Work/Life issues, they know that the greatest employee satisfaction comes from those who exercise flexibility options.
Measurement	IBM is often asked how many employees utilize flexible work options. The major options tracked are Mobile employees and Work-at Home-Employees. They also track employees who are on a leave of absence and who work part-time. The remaining options are more guidance than policy, so managers can use them at their discretion.
Manager Comments regarding Teleworking	"I worked at home exclusively for a period of 18 months and I would caution

"I got diagnosed with rheumatoid arthritis in January 2003 and was in bad medical shape for 8-10 months that year, and a couple of months in late 2005. I was too disabled to drive and/or spend a whole day in the office during this time period, but thanks to working at home and flex-hours, I was still able to work more than full-time during this time period. I flexed my hours fairly dramatically in order to accommodate the illness and various medical appointments, but I didn't log a single sick-day. This was particularly important since I have a skill set that is constantly in high demand, so if I wasn't at work, then we would have trouble responding to all the customer requests in this area, so IBM definitely benefited by keeping me at work."

– Nancy Roper, Certified Consulting

Recommendations

If you want flexible work arrangements to be used in your company, make your people aware of them, but more importantly get managers buy-in. When you make them aware, do it in a disciplined manner so that the messages get out regularly and frequently, rather than on an ad hoc basis.

Managers need to feel comfortable with the offerings and allowing employees to use them. For example some may feel uncomfortable about their employees working from home, as they think that employees may not expend their best work effort because they are out of the line of sight. IBM is attempting to give education not only on what is available to managers, but why they should continue to embrace Work/Life & Flexibility Programs.

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Program	
Description	AstraZeneca has a well established program of flexible work arrangements including flex-time, part-time, job share, telework and flex Fridays / compressed work-week. The company has a very broad definition of diversity that usually accommodates work-life, and the work-life team is part of the diversity group. Diversity is a very important concern for the company, so it it is their view that they can get traction for work-life by linking it to diversity. AZ maintains that the work place has to adapt to meet the varied needs of a diverse workforce. This is true for women, minorities, different ethnic groups, and employees at different ages both younger and older. AZ needs highly engaged employees that are really going the extra mile. They know that two of the drivers of engagement are work-life and diversity. Some managers express frustration in trying to reconcile the concept of work/life balance with the increasing workloads prevalent in today's workplace. So, instead of talking about "balance," the work-life team talks about having a flexible and inclusive environment which improves employee effectiveness. Managers can relate to this and accept it much more easily. However, one can only go so far with flexibility until the issue of overwork is addressed. AZ is looking at processes people can use at the workgroup level to improve both flexibility and effectiveness while managing heavy work loads. The focus on effectiveness helps overcome resistance in some areas of the business to thinking about different ways of working. This perspective in turn has a positive impact on advancement and retention of women and minorities, on reduction in stress-related illness, and on improvement of employee engagement.
Administration	The work-life programs are administered by a small work-life team that is part of the Diversity organization.
Drivers – Why Developed	The initial program came at the time of the company merger in 1999. There were two campuses that were about 25 miles apart. It could take an hour to get from one to the other and it would be some time before a new, larger facility would be ready to accommodate everyone on the Wilmington Campus. The idea for the approach grew out of the commitment of employees from both sites to work together in teams in the interim. Employees suggested that flexible work arrangements could be an important tool in making it work. It also grew from the desire to have a total rewards approach to recruiting and retention.

The current major commitment to diversity is being driven by:

- A broad definition of diversity that goes beyond race and gender and includes diversity of thought and work style as well as family status, age, and so forth.
- Belief that diverse teams benefit the business.
- Knowledge that meeting diverse patient needs in an innovative way requires the organization be more representative of the groups being served.

when they “flex” their schedule it’s a flex arrangement. Surveys indicate that the utilization is actually higher than the tracking system shows. Overall at headquarters, nine out of ten people use some kind of formal/informal flexibility of one kind or another.

There is a global employee survey every other year that has a set of questions

Employee Comments

"I think it helps them [AZ] retain a lot of good employees that otherwise would probably quit, stay at home, or find other part-time work. We have teleconferences which we do for the part-time employees that have been very helpful. I've even heard a manager comment that sometimes they get more work out of their part-time employees than some of their full-time employees. I think that flexible work arrangements have helped to create more dedicated employees because they're grateful to the companies that provide this opportunity. I'm more grateful to have an opportunity to be at home with my children. But there are some people who have other needs -- whether it's elderly parents or different things like that. And I think everybody kind of sees the positives that come out of it."

"I think the only resistance is sometimes there are counterparts who aren't as flexible as you are. They are in the field every day. So then I think you have to be flexible, too. For example, it's your day off, but your counterparts know that they can call you at home if they need to -- that kind of thing. You can't close the door and say -- this is my day off. Don't call me at home. I think it kind of works both ways."

Compelling Quotations from Managers

As mentioned earlier in this report, managerial resistance is one of the more difficult hurdles to cross when it comes to making flexible work arrangements work for the employee and the business. Although a few of the 18 managers we interviewed were enthusiastic about the new program at the outset, most of them described their initial reluctance. Many of them spoke of three factors in overcoming their fears: (1) learning new ways to manage and evaluate employees; (2) working with teams to set up the program so that all are working toward similar goals; (3) and building trust. All of the managers spoke enthusiastically about the benefits of such programs to the organizations.

Managers clearly had to adjust to the new way of working. Most of them admitted to some reluctance in the beginning. One said it this way:

> *[When I first heard about the flexibility program] I had mixed feelings. It was clear that the program would provide a great deal of flexibility to help individuals balance their personal and work priorities, which would help to attract and retain talent. However, I was concerned that the flexible work arrangements could impact productivity [Our company] is a matrixed organization that relies heavily on cross-functional teams and meetings to accomplish goals. As the program was being described early on, I had some reservations about the ability for individuals to participate actively in the cross-functional working groups while working from home, or not being available full-time in the office.*

Another manager reports nothing but positive experiences.

> *[Since the initiation of flexible working arrangements] I have several people who have taken advantage of the program, and generally, I have had nothing but positive experiences. Employees have been able to be effective on cross-functional teams by formalizing their responsibilities on the team and leveraging existing technology and communication capabilities. As a manager, I have adjusted the way I work with people who use flexible work arrangements to ensure they are well engaged and integrated into the organization, but I have not adjusted my expectations for their performance levels. I have found that people can be more productive when working from home because they often do not have as many distractions and can take advantage of time that was previously spent commuting to work.*

Employees seemed to recognize that managers had to make adjustments. One employee told us that the process took some time and that the manager was initially reluctant, but that he came around. This employee said that her department now consistently delivers high performance based on the unique strengths of the team.

Like the manager quoted above, other managers confessed that their worst fears were not realized. One concern in particular that managers often have is the worry that allowing one person to work more flexibly opens up the floodgates for everyone to make the same request. One manager talked about his own experience with this problem:

> *I thought a lot of people would probably...I anticipated a lot more requests than I ever received, but I think it has more to do with the fact that, I think we are fairly flexible and accommodating, just in general, with people's balance of personal and workplace [needs].....When it works out, it is a win-win situation. The employee is happier and as a manager, you have been able to repay an employee that you obviously value, or you probably wouldn't have let them be on a [flexible schedule]. I mean, it demonstrates a commitment from [the company] that we are not just talking about having a work-life balance, but that we offer a program to make it work.*

In the eyes of several of the managers we interviewed, the role of teams and how they function seems to be a major factor in the success of alternative work arrangements. One manager made this explicit by suggesting that anyone interested in implementing one of these programs should "get their entire team together, sit down, and work this out." He recommended including people who want to use the option and people who do not.

Another manager provided a rather dramatic example of this approach:

> *...I have seen phenomenal results; people completely turned around. I actually have in my very first group an employee who was very close to needing disciplinary action because her performance was not meeting those of her peers. And right as this [team approach] was being introduced, she was included in that group and has excelled and actually will probably be promoted in the next two months because it has completely turned her around. It's the first time she said that she felt that her contributions as an employee have been recognized since the early'90s, which I thought was very interesting.*

The employee about whom this manager was speaking had similar thoughts:

> *I feel more responsible now, because we are more of a team. We need to meet our objectives and goals. Whenever I feel that I'm caught up, I try to go and see if there is anything else that the others need to achieve so we are in line...Because before, it was—"you do this, you do that, and if you don't do it, we're all going to fail—too bad, that's your problem." Now...it's not you or you, it's us. So we are all responsible. My productivity has increased...*

Another important factor in the success of these programs is the development of trust, especially for those who are telecommuting. One manager said "It takes a little leap of faith." Another manager was quite forthright about trust per se:

For people that select this phased retirement, I think it helps ease them into retirement on a gradual basis rather than have this be, you know, all-or-nothing proposition. Very, you know, you're breaking your neck at work one month and then the next month, you're retired cold turkey. For me, that's just not the approach that I wanted to take." [employee enjoying phased retirement]

[To be able to] come home and spend more time with my children. I mean, there's not a price you could put on that. And it helps me be a better manager I feel like at my home situation and at work. The days that I work I feel like I'm able to give more of myself because I'm not spread so thin. Does that make sense? Interviewer: Yes. So in terms of the integration between your work and nonwork activities. It sounded like it was a little difficult at first because they overlapped. But how is that working now? Employee: For me, it's the perfect balance between the two." [employee, mother of young children]

As the employees' ability to take care of important matters in their personal lives are made possible by the opportunity to work more flexibly, their perception is their productivity at work increases. Employees described their increased ability to focus on their work and a renewed sense of responsibility, which led to improved performance. Listed below are the comments of several different employees.

I'm always embarrassed to say this when people ask me that, but it's really, I think productivity-wise, it's better because I'm home. I'm locked away in my office. I can truly concentrate on work. I'm not in that work environment where somebody is always coming by your office and asking you a question or to talk at the water cooler and all of that. It kind of takes that away. So I can really concentrate on my work better. And when I do have projects and things that I need to read or research, it really allows me to concentrate on those things better. [satisfied telecommuter]

So, for me, I was motivated to get my work done if I had a deadline because I wanted tomorrow off with my son. [working mother]

I would say, just by having happier employees definitely helps, who are more focused and dedicated, but you kind of feel that, even though it is a benefit and it is offered to everybody, if they are able to do it, there is an appreciation and a desire to work a little bit more, and I think that is true for other people I know on [program name], that aren't even part-time, people who work from home. It gets them—it just gives you better work-life balance, which makes it easier to get things done and be happy about doing them.

Many employees said that they could not leave the organization unless they found another company who would provide similar options for working flexibly. One employee said, “If I were to work for another company, I would want something like this because it showed that they value family and being flexible and supporting that.” Another was more explicit:

> *[This FWA] has increased my loyalty to the company both because they are doing something so great for me, it makes you like working there more, but also because you think, “Well, what’s the alternative if I leave? Could I ever leave this company that’s allowing me this kind of flexibility and go to a company that doesn’t know me from Adam and wouldn’t allow me to do that?” That’s a lot to give up, in addition to my benefits and things like that. They’d have to offer me a lot more for me to want to leave because of the flexibility that I’m getting here.*

Similarly, another valued employee who loved her job, when confronted with an unexpected move to another city, was offered the option to join a teleworking program. Her enthusiasm was infectious.

> *It was fantastic. To me, it was the greatest thing because I was really conflicted in that I loved the job, but I felt like I was...I’m not going to stay in the position because of the location. And, I was able to stay in the position AND move. So that was...it was perfect.*

Another employee was equally effusive...

> *It takes a lot of responsibility but I like it. And I love the fact that this program allows me to live my life the way I do. So, I just make sure I’m doing the best job that I can do for this company because I never want to lose this.*

And finally, one employee raved about her employer.

> *For me, [this company] is the perfect employer for the following reasons: (1) I love my job; (2) I’ve got a fabulous manager who makes my job easy; (3) I love working from home; (4) I love the flexibility to adjust my hours and take time off on short notice if needed. I wouldn’t dream of working anywhere else unless they could provide these four perks.*

The employees we interviewed are extremely grateful for the autonomy and respect that flexible work

Summary

For the last 15-20 years, forward-thinking and well-intentioned business organizations have created numerous policies and programs for providing flexibility as to when, where, and how people work. National surveys show that 84% of leading employers have created the possibility of flexible schedules and nearly two-thirds offer telecommuting (Kossek, Lautsch, & Eaton, 2005). We have seen, however, that the use of these programs has stabilized or even declined in recent years (Golden, 2001). With good reason, some employees have been reluctant to use the programs for fear of wage and job growth penalties. Managers and supervisors have had their own set of fears and sources of resistance to widespread use of such programs.

Our conversations over the last year with 20 leading organizations have yielded new insights as to why policies or programs alone are insufficient for making flexible work arrangements a reality. Making them accessible and usable requires an overhaul of the postindustrial culture that requires long hours and rewards "face time." The good news is that our 20 companies provided many examples of ways to accomplish this rather dramatic shift in organizational culture.

According to our respondents, culture change requires:

- Research to discover the unique needs of the employees in your own organization; too many programs/policies are copies of the good ideas of other companies.
- Leadership support; finding a champion who will doggedly pursue organizational support for new ways of working; change takes time and must be intentional
- Education and training of management and employees to allay concerns on both sides
    - Provide results of research to discern needs of employees
    - Make the business case; how much will it cost to replace these employees who might leave if the organization cannot make flexibility usable and successful?
    - If possible, showcase some employees who have been very successful while working flexibly in one way or another
- Clear strategies for the rollout of the programs with information about who is eligible, who will be affected, and how to address glitches in the system
- A method for tracking usage and results—are we still reaching organizational goals?

Why go to such lengths?

...Because this is the new imperative. Our 58 respondents told us that it is possible to offer excellent flexible work arrangements for employees and be more successful as a business. Satisfied employees make good workers. In order to attract and retain younger (and older) workers, companies will need to offer flexibility of all kinds, and make these new ways of working stick. This is the way forward for companies that want to retain top talent.

Participants included representatives of 20 companies; in all we conducted 58 interviews. We are immensely grateful to the following companies for their generous contributions to this effort.

List of participating companies

Company	Topic
Alcatel-Lucent	Part-Time Work
American Airlines	BOLD Initiative
AstraZeneca	New Approach for Flexible Work Arrangements
Baxter	Alternative Work Arrangements Proposal Kit
Best Buy & CultureRx	Results-Only Work Environment (ROWE)
Booz Allen	Teleworking
Dell	Virtual Call Centers
Deloitte & Touche USA LLP	Personal Pursuits Program
Eli Lilly & Company	Teleworking
First Horizon	Prime-Time Schedule
GlaxoSmithKline	Part-Time Sales Force
Hewlett-Packard	Teleworking and Job Sharing
Intel	New Parent Reintegration
International Business Machines	IBM Flexible Work Options – New Communications Strategy
KPMG	Reduced Workload Model
MITRE	Phased Retirement
PriceWaterhouseCoopers LLP	FWA Database
Raytheon	9/80 Work Schedule
Takeda Pharmaceuticals	Work Paths
TAP Pharmaceuticals	Job Sharing for Field Sales Representatives

Report limitations

We believe our conversations with more than 58 representatives of 20 organizations at the forefront of making flexible work arrangements a reality have yielded interesting information about the process involved in implementing such programs so that they work both for the business and the employee. We hope that other organizations seeking to establish FWAs find the suggestions of our respondents helpful and worthy of emulation. On the other hand, our report is limited in the following ways:

We asked members of the Boston College National Roundtable to volunteer their participation if they perceived that they had a very successful flexible work arrangement of one type or another. Almost all members are considered "best practice work-life" companies. Slightly less than half of our members participated. Results cannot be generalized to all roundtable members or to other organizations.

Similarly, each human resource representative who gave us the details about their programs selected

Appendix B: Interview Guides

This section of the appendices contains the questionnaires used to interview the HR representative, the manager, and the employee.

Description

15a. If yes, how is this done?

15b. If yes, how is this information used?

16. Are data collected in order to justify the expense of the program (i.e., ROI, turnover, absenteeism, turnover, etc.)?

16a. If yes, what methods are used to do this?

16b. If yes, how have these measures changed since the introduction of the program?

Benefits

17. What do you think are the primary benefits of the program for the organization?

17a. Does it have an impact on the bottom line?

17b. Do you think there are benefits for the organization just by offering the program (regardless of utilization rate)?

17c. Are there any negative issues related to offering the program for the company?

17d. Does one employee's use of the program potentially have a negative impact on another employee who is not using it? (e.g., shifts impact to co-workers)

18. What are the primary benefits for the individuals who participate?

19. What are the primary benefits for the managers whose employees use the program?

20. Are there any benefits to the organization's customers because of this program?

Overall Attitudes

25. Do you have employee survey results regarding your organization's work-life programs? If yes, what do they show?

    25a. Overall, how do you think employees feel about work-life benefits at this organization?

    25b. Do you think these attitudes have changed over time? If so, how?

    25c. What impact do you think this program has on the attitudes of employees towards the company (if any)?

Other Information

26. Is there anything else you'd like to tell me about this program that I haven't already asked?

27. Is there anything else you'd like to tell me about other programs or policies for work-life integration in your company?

28. We would like to talk with an employee who has used this program, and a manager or supervisor who has supervised someone who has used this program. Can you provide us with the names and phone numbers of an employee and manager who are willing to be interviewed for this study?

    28a. If so, collect names and phone numbers.

4. What is the total # of employees that you are currently supervising?

Program – provide title of program

5. Can you describe for me in your own words what the program is intended to do, and how it works?

6. Is the program an entitlement (i.e., everyone can use it) or do you decide who can and can't use it?

6a. If discretionary, do you have certain criteria that you use to decide whether you will approve an employee's request to use the program?

6b. If you do not have criteria, how do you decide?

Communication

7. Do you remember how you first found out about this program?

8. Are there ongoing communications about this program? To you? To your employees?

9. What would you say your reaction was when you first heard about this program—positive, negative, or neutral?

10. Has your attitude changed over time, and if so, how?

11. Are you primarily responsible for telling the employees you supervise about this program?

12. Does your supervisor encourage you to have the employees you supervise use this program?

13. Is the use of this program part of your annual evaluation by your supervisor?

Utilization

14. How long after the program was made available did one of the employees that you supervise first use it?

15. How long have you supervised employees who use this program?

16. When the first employee used it, did you approach the employee or did the employee ask you about it?

17. How many employees do you supervise who are currently using _____ (name of program—see above)?

19b. On the responsibilities outside of work or the integration between work and nonwork activities of the employees who use it?

19c. On the productivity of the work group?

19d. On your job?

19e. On the organization?

20. (If appropriate, based on the nature of the program) Do other employees know that their co-workers use this program?

20a. If yes, what is their reaction to the use of the program by their co-workers?

21. Are there any problems with the use of the program by the employees who you supervise?

21a. On the employees who use it?

21b. On the productivity of the work group?

21c. On your job?

Recommendations

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Communication

6. Do you remember how you first found out about the program?

Utilization

7. What factors were involved in your decision to use the program?

8. What process or steps did you take to become involved in this program?

9. Once you decided to use it, how long did it take before you were able to actually use it?

10. How long have you used the program?

11. What does your supervisor think about your use of the program?

12. Do you use other flexibility programs, and if so, which ones?

Impact

13. How has the use of this program affected:

    13a. your work responsibilities – productivity, quality of work, other work aspects?
    13b. your feelings towards the company?
    13c. your responsibilities and interests outside of work?
    13d. the integration between your work and nonwork activities?

14. How do you think the program helps the company?

Recommendations

15. Would you recommend the program to co-workers? Why or why not?

16. If a supervisor from another company was thinking about implementing a similar program, what would you tell this person?

17. Have you had any problems with the program or being associated with the program?

Other Information

18. Is there anything else you'd like to tell me about your use of this program that I haven't already asked?

19. Is there anything else you'd like to tell me about other flexibility programs or policies at the company?

Appendix C: References

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