

# Appendices

## Appendix A: Our Methods

The purpose of this project was to identify and present a broad array of approaches to the implementation of flexible work arrangements. Our intent was to get beyond simple lists of programs and policies to provide details as to how to carry out and sustain these programs. We worked with Center for Work & Family member companies to identify model programs to be included in the report. Our goal was to examine a broad palette of work arrangements from approximately 15-20 companies, and to speak with company representatives who had used the arrangements as well as their supervisors.

The member companies are those organizations that comprise the Boston College Work & Family National Roundtable, founded in 1990, comprised of approximately 45 employers known for their “best in class” human resources policies. The Roundtable provides national leadership to shape corporate and public responses to the demands of work, home, and community in order to enhance employee effectiveness. All but one of our participants was a representative of our member companies.

The project was modeled in part after a prior study conducted by the Boston College Center for Work & Family entitled *Increasing the Visibility of the Invisible Workforce: Model Programs and Policies for Hourly and Lower Wage Employees* (Litchfield, Swanberg & Sigworth, 2004). We used a similar approach of identifying model programs and conducting interviews with company representatives.

We began the project in October 2006 by piloting our approach with two companies. We used these pilot examples to refine our methods and recruit additional participants. The main portion of the study was initiated in January 2007 and interviews were completed by April 2007.

## How information was gathered

For each of the companies participating in the study we used the following approach.

- We began by conducting a brief interview with the primary company contact over the telephone to collect some basic information about the flexibility program to be featured. In some cases there were multiple successful programs within one organization and we selected one that would ensure we had a broad palette of flexible work arrangements in the study.
- We collected any written materials that described the program.
- We conducted separate telephone interviews with three representatives:
  - An HR person best equipped to answer our questions
  - A manager of an employee who had used the flexible work arrangement being featured
  - An employee who had used the flexible work arrangement being featured
- Interviews were recorded and transcribed for qualitative data analysis. Summary case reports were developed for each program and submitted to the organization for review and approval.
- Transcribed interviews were coded using the ATLAS.ti.5 software program for themes that cut across all the conversations.

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	9/8o 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 the employee using the program and his/her manager for conversations about their experiences. Thus, employees selected for participation were not selected in an unbiased, random fashion. We have no information about general perceptions among employees of each company or employees/managers with less positive experiences.

Finally, our report is based, as mentioned, on perceptions of success. We have no objective data to verify or refute these perceptions.

## Appendix B: Interview Guides

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

### *Flexibility Study Interview – HR Department/Expert*

#### **Description**

1. Confirm the program to be discussed in this interview.
  - 1a. Describe the program in your own words.
  - 1b. Please describe the steps people go through to use this program.
  - 1c. Follow-up with specific questions about the program and how it works—based on reading written materials before the interview or from their description above.

#### **Background**

2. When was the program offered first?
3. What were the factors/business drivers that led to the development of this program?
  - 3a. Was there a single champion who was responsible?
  - 3b. A certain department or business unit?
  - 3c. An employee task force?
4. How was it rolled out first?
  - 4a. Did it begin with a pilot program?
  - 4b. If yes, where was the pilot program? (i.e., available first only to those in a certain geographic location, business unit, or with certain characteristics)
  - 4c. If yes, when was it expanded?
5. What were the obstacles to first offering it?
  - 5a. How were those obstacles overcome?
  - 5b. Are there potential obstacles in the future that might jeopardize the continuation of the program or policy?

#### **Eligibility**

6. To whom is it offered?
  - 6a. All employees?
  - 6b. Only full-time employees?
  - 6c. Only for those in certain positions/job ranks?
  - 6d. Only for those at certain income levels?
  - 6e. Only for those in certain departments or business units?
  - 6f. Only for those in certain geographic locations?
7. Is the program an entitlement (i.e., everyone can use it no matter what) or based on individual supervisor judgment?
  - 7a. If individual supervisor judgment, are there guidelines regarding when it can and can't be used?

- 7b. If yes, are these the same for all supervisors, or do they vary by department or business unit?
- 7c. Is there a criteria around job performance?

## **Communication**

### *Employee*

- 8. How is the program communicated to employees?
  - 8a. What methods are used? (website, employee newsletters, new employee orientation, etc.)
  - 8b. Is this communication strategy different than other programs and policies?

### *Supervisor*

- 9. How is it communicated to supervisors?
  - 9a. Via written communications
  - 9b. Training
- 10. Are there special ways that supervisors are encouraged to support the employees they supervise to use the program?

### *External*

- 11. Is the program communicated externally to those outside the organization?
  - 11a. If yes, how is it communicated (e.g., through “best of” applications, as a recruitment tool, in interviews with media representatives, etc.)?

## **Administration**

- 12. How is the program administered? What is the process for managing it?

## **Utilization**

- 13. Does your organization track utilization rates of the program?
  - 13a. If yes, how do you track it?
  - 13b. If yes, what are the utilization rates?
  - 13c. Do you have utilization rates over time, and if so, how have these changed over time?
  - 13d. If it increased over time, to what do you attribute this increase?

## **Measurement**

- 14. Do you or anyone else at your organization do anything to assess the effectiveness of the program?
  - 14a. If yes, what methods are used to assess the effectiveness?
  - 14b. If yes, do these methods include direct feedback from the participants?
  - 14c. If yes, how often is the program assessed?
  - 14d. If yes, how is this feedback used to improve the quality of the program?
- 15. Do you collect information about whether the program is doing what it was designed to do?

- 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?
- 21. What factors have had the biggest influence on making the program successful?

### **Cultural Changes**

- 22. Have there been any changes to the culture/organizational climate of the company as a result of this program?
  - 22a. If so, please describe them.
  - 22b. Are additional cultural changes needed to make the program fully successful?
- 23. Please describe any efforts that have been made to get top management support for this program.
  - 23a. What activities have the top managers done that demonstrate their support for this program?
  - 23b. Is there a particular top manager who has been the primary sponsor or driver of this program?
  - 23c. If yes—Do you think that person would be willing to discuss this program with us for a few minutes? (If so, collect name and phone number and ask HR person to “grease the skids” for the interview.)

### **Other Programs and Policies**

- 24. How does the program fit with the other programs or policies that are offered to employees?
  - 24a. Are there other programs or policies directed at the same issue?

## 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.
  - 28b. If not now, ask when that information will be provided.

## Recommendations

29. What recommendations do you have for other companies that are interested in developing a similar program?
30. Do you know of other organizations that are doing something innovative in the area of flexibility?
  - 30a. If yes, what organizations?
  - 30b. If yes, do you have contacts in these organizations?

*That completes the interview. Thank you very much for taking the time to provide us with this information. Please get back to us as soon as you can with the additional names and phone numbers of the other people in your organization for us to interview.*

## **Flexibility Study Interview – Manager**

### Demographic Information

1. What is your job title?
2. How long have you been at this organization?
3. How long have you been in a supervisory position?

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)?

18. How has the number of employees that you supervise who use the program changed over time (i.e., increased, decreased, or stayed the same)?

**Impact**

19. What would you say are the positive benefits of having the employees you supervise use the program?

19a. On the work responsibilities of the employees who use it?

- 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**

- 22. What would you tell a supervisor at another company location about this program?
- 23. What would you tell a representative from another company who is considering offering this program?

**Other Information**

- 24. Is there anything else you'd like to tell me about supervising employees who use this program that I haven't already asked?
- 25. Is there anything else you'd like to tell me about other flexibility programs or policies for the employees you supervise?

***Flexibility Study Interview – Employee***

**Demographic Information**

- 1. What is your job title?
- 2. What are your job responsibilities?
- 3. How long have you been at this organization?
- 4. How long have you been in your current position?

**Program – provide program title**

- 5. Can you tell me in your own words about the program that you have been using?

## **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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