



Flexible Work Arrangement Toolkit



ADVANTAGES TO WORKPLACE FLEXIBILITY:

Workplace flexibility has been proven to enhance the university's ability to attract and retain a quality workforce. It is designed for all faculty and staff with attention to working parents, individual's with professional development, community service and avocation responsibilities.

INCREASED PRODUCTIVITY – Encourage employees to work when they are the most productive either early in the morning or later in the day. Studies have revealed the hidden cost of unscheduled absences in the millions for large employers and show that family issues, stress and personal demands not illness are more often cited as reasons for taking time off work.

INCREASED RETENTION – Losing talented staff is expensive and time consuming. In a recent Watson Wyatt survey of 614 companies, flexibility was ranked by half of their employees as their most effective retention tool higher than above market salaries, stock options and training.

IMPROVED COVERAGE AND SCHEDULING – Varied, individualized schedules can allow for expanded office hours to provide greater customer service during a greater number of hours each day.

ENHANCED RECRUITMENT – Generation X and Y represent 45% of the current workforce who are demanding more flexibility to manage personal and professional goals. Applicants are asking companies about workplace flexibility options before accepting a position.

RAISE MORALE AND JOB SATISFACTION –Staff who have flexibility in when and where work gets done tend to have a greater satisfaction and stronger commitment to the job with higher levels of engagement to the employer.

REDUCES STRESS – Employees with flexible careers tend to feel more in control of their daily lives and less stressed. Individuals with high stress tend to feel burned out which leads to overall lower job commitment, increased illness and reduced productivity.



NATIONAL STATISTICS

A 2006 survey conducted by Alliance for Work Life Progress (AWLP) reveals that of seven areas central to work life effectiveness, health and well-being (34%) and workplace flexibility (30%) compete as the top priority for employers.

An increasing number of organizations offer employees some type of workplace flexibility but the practice is not widespread according to the Society of Human Resource Management's (SHRM) 2006 Benefits Survey report.

- 51% of human resource professionals indicated that their organizations offered some form of telecommuting
- 35% offer compressed work weeks
- 18% offer job sharing

The Center on Aging and Work/Workplace Flexibility at Boston College survey suggest that 70-80% of workers aged 50 and older state that they expect to continue work past the traditional retirement age but most express a preference to work in a way that is different from the standard 9-5, five day work week.

A 2005 survey of baby boomers conducted by Merrill Lynch found that 42% said they want to cycle in and out of work and 16% want to work part-time.

According to the United States Department of Labor, Bureau of Labor Statistics May 2004 report on flexible and shift schedules, over 27 million full-time workers had flexible work schedules that allowed them to vary the time they began and ended work. The 2004 proportion (27.5%) of workers who had a flexible schedule remains fairly consistent with the 2001 data (28.6%).

- Men are somewhat more likely to have a flexible schedule than woman (28.1 and 36.7 percent, respectively).
- More common among white workers (28.7%) and Asians (27.4%) than among black (19.7%) or Hispanic/Latino workers (18.4%).
- Most common among management, professional and related occupations.
- 1 out 4 workers can work a flexible schedule compared to only 1 of 10 who have a formal, employer-sponsored flextime program or policy.

U.S. Dept of Labor reports that our labor force is growing less than 1 percent annually and the number of workers between 25- 44 is actually shrinking. The need for qualified staff forces companies to rethink their recruitment efforts, productivity incentives, benefit plans and work schedules which were designed for a different generation of workers with different lifestyles.

Families and Work Institute 2002 survey reveals that people in workplaces characterized by high levels of flexibility are both mentally and physically healthier than employees in more rigid environments.

Workplace Flexibility 2010 initiative revealed that 80% of employees report wanting more flexible work options and would use them if there were no negative consequences tied to utilization.

Workplace Flexibility 2010 initiative reports that in 1970, couples worked a combined average of 52.5 hrs per week compared to couples in 2000 who worked a combined average of 63.1 hrs per week. Almost 70% of them worked more than 80 hrs per week while 59% of those are caring for a relative or friend at the same time.



CONSIDERATIONS BEFORE IMPLEMENTING A FLEXIBLE WORK ARRANGEMENT

Granting a flexible work arrangement is a privilege and should not be considered a right. It is a cooperative effort between the staff member and manager and must consider both the operational needs of the unit and the personal needs of the request.

All requests for flexible work arrangement should be given serious and careful consideration. Requests received based on family care needs (childcare, eldercare, personal illness etc.) should be given primary consideration in evaluating multiple requests within one departmental unit where interdependency is necessary to accomplish business goals. Otherwise, the reason for the request should not matter.

Some positions do not lend themselves to flexibility.

Some individuals are not good candidates for a flexible work arrangement. Good candidates for a flexible work arrangement are self-motivated, meet or exceed performance standards, are dependable, work well independently, are well organized, have excellent time management skills, have proven good work habits, are highly disciplined and results oriented. The individual's work style and work history must support the requirements of the flexible arrangement.

Successful flexible work arrangements must include close and frequent communication between the staff member and the manager.

Exempt staff (typically paid monthly) are not eligible for overtime. Nonexempt staff (typically paid biweekly) are eligible for overtime and the university is required to pay for overtime hours worked. Flexing time should not cause overtime to occur unless approved by management.

Consider a trial period (90 days) in some cases to provide an opportunity for employee and manager to work together in good faith to implement the proposal and to work out any problems. All flexible work arrangements should be reviewed and may be terminated at any time, given cause, or when business needs dictate.

To assure that all parties understand the expectations of the arrangement, a written agreement should be developed and mutually decided upon.



QUESTIONS TO ANSWER BEFORE REQUESTING A FLEXIBLE WORK ARRANGEMENT

While these questions are primarily geared toward the employee to be prepared to address and propose solutions, managers may find these questions as a helpful tool as well.

Can your job duties be performed equally as well during the hours of the flexible work arrangement that you are proposing?

Does your job require you to be at the work site during the regular work week?

Would the proposed work schedule affect customer service?

What goals did you establish through the performance development process? How will this arrangement help you to meet those goals?

Would the proposed work schedule affect work volume, peak periods, projects in progress, your colleague's work and/or overtime?

Would the proposed work schedule adversely affect communication between you and your manager and/or colleagues?

Would the proposed work schedule adversely affect your manager's ability to supervise you?

How will you manage those employees who report to you?

How will results or productivity be measured effectively?

What tools, resources, and environment are required for your job?

What equipment/technology will your arrangement require? Are there cost implications? Are there any cost savings for you or your college/VP unit that might result from this arrangement?

How will the flexibility work arrangement affect cross-training initiatives, team based approaches and other strategies?

Are you self-directed and comfortable working without close supervision?

Do you manage your time well? Are you comfortable working alone for long periods of time?

What are the healthcare or other benefit implications? For example, if you reduce your appointment below a 75% FTE, your healthcare contribution will increase. Visit www.hr.osu.edu/benefits for more information.

MANAGER ASSESSMENT

Am I ...

- Contributing to a work environment supportive of the universities' work-life philosophy, while meeting business needs?
- Working with management to help them understand the need for and assess the feasibility of specific flexible work arrangements?
- Providing answers to questions about potential impact on pay or benefits associated with specific schedule changes?
- Collecting and sharing best practices and success stories; communicating lessons learned?
- Taking an active role in educating and guiding faculty/staff and other managers as they discuss creating more flexibility in their work group?
- Helping employees think through potential impacts on their career development goals?
- Providing insight into creative ways that work-life conflict can be resolved?
- Facilitating brainstorming between managers and teams so they may consider as many options as possible?
- Making suggestions to leadership for the development of new guidelines, policies and practices that support flexibility?
- Helping define and monitor metrics of success?
- Suggesting ways that work processes could be redesigned or streamlined to achieve more flexibility or productivity?
- Serving as a resource for employees on eligibility issues and the practical application of specific flexible work arrangements?
- Counseling the employee about the logistics and practicalities of specific work options, helping to ensure their proposal is reasonable, logical and workable?
- Serving as an advocate on behalf of the employee and facilitating the implementation of the flexible work arrangement, once the proposal is accepted?



MANAGERS' RESPONSIBILITIES TO SUPPORT A FLEXIBLE WORK ARRANGEMENT

When you receive a proposal for a flexible work arrangement...

Yes	No	Responsibilities
		Respond to the request in a timely matter and consider each proposal on its own merits. If you have questions or need assistance call your College/VP human resource professional and/or The Office of Human Resources, Work Life @ 247-2591.
		If the proposal seems to address any health issues, contact your College/VP human resource professional and/or The Office of Human Resources, Integrated Disability @ 292-3439.
		Determine if the grant requires approval from your own supervisor/manager dependent on your college/unit protocols.
		Remember that granting a flexible work arrangement may help increase productivity, satisfaction and commitment to the position and reduces absenteeism.
		Remain open to new ideas and give it a try before saying no.
		Counsel employee about any potential impact to pay, benefits, training, etc or refer them to the College/VP human resource professional.
		If the proposal is unacceptable, be supportive and suggest alternatives. If performance concerns are the basis for the denial, be direct and honest with the employee. Consider development of a performance improvement plan to coach the employee to meet and exceed expectations. Encourage the employee to rework the proposal, if possible.

Once the proposal is approved...

Yes	No	Responsibilities
		Work Assignments. Communicate the expected results, deadline to complete tasks, expected quality and other criteria that might affect the successful completion of duties.
		Help the employee organize their work. Define the timeframe involved in completing duties and resources required to perform work.
		Communicate the new arrangement to other staff in the college or department.
		Establish regular intervals (every 90 days, 6 months, annual) to evaluate the effectiveness of the arrangement. Schedule regular meetings to assess needs and discuss concerns.
		Provide effective and supportive feedback to the staff member throughout the flexible work arrangement period.
		Use the same performance management tool used for other employees in the dept or college.
		Encourage staff members to problem solve and network with others in similar arrangements.
		Reward performance and productivity, not time spent in the office.
		Determine if a flexible work agreement would be valuable to you and the employee. See sample agreement provided by OHR, Work Life.



FLEXIBILITY IN SCHEDULING HOURS WORKED

FLEX TIME - Gives the employee the flexibility in arrival, departure and/or lunch times. Flextime hours can be built around critical core hours (9am-3pm) if office coverage, customer service and staff interaction consideration exist. The total number of hours worked in a week or pay period does not change and is based on the individual's appointment.

Common flex time arrangements:

- **Fixed** – Agreed upon starting and departure times are set that differ from the college or unit's norm. This schedule is kept each day. (e.g., Monday – Friday 7am – 4pm).
- **Variable Schedule**– Starting and departure times vary from day to day. The employee may arrive at work and leave at a different time each day provided the same number of hours are worked each day. Typically the arrival and departure times flex around set core hours established by the college or unit. (e.g. flexing start and departure times around the core hours of 9am – 3pm).
- **Variable Day** – Consistent schedule of a different number of hours each day as long as the employee achieves the expected # of hours within the week. (e.g. Monday, Wednesday 10 hrs, Tuesday, Friday 8 hrs and Thursday 4 hrs).
- **Mid-Day** – The employee may take a longer scheduled lunch break than usual if they make up the extra time by starting work earlier or staying later (e.g. work 8-12, break 12-2pm, work 2-6pm).

COMPRESSED WORK SCHEDULE - Gives the employee the ability to work their normal full-time appointment in fewer than 5 days per week.

Common arrangements:

- A full-time schedule of work is accomplished by working four 10 hour days.
- A full-time schedule of work is accomplished over two weeks by working 80 hours in nine days. (e.g., work eight 9-hour days plus one 8-hour day).

TELECOMMUTING (Flexplace) – Allows for a portion or the entire job to be performed off-site (typically at one's home) on a regular, recurring basis while remaining connected to the college/unit via computer, fax and/or telephone.

Common arrangements:

- Regularly work at home one to five days a week.
- Regularly work at another work location designated by supervisor/manager.
- Temporary arrangement for a personal need.
- Temporary arrangement for a specific project.

BENEFITS to FLEXTIME/COMPRESSED WORK/TELECOMMUTING	<ul style="list-style-type: none"> -Employee retains full pay and benefits. -Employees feel encouraged to work and have time off work that more closely meets their needs. -Easy to implement and typically has no direct cost to the college or unit.
POTENTIAL CHALLENGES	<ul style="list-style-type: none"> - May change the way the employee needs to be managed or supervised. - May make it more difficult to schedule meetings or coordinate project work.
DISCONTINUATION	<ul style="list-style-type: none"> - May become unfeasible at any time and may be discontinued at the discretion of either the employee or manager.



FLEXIBILITY TO EXIT and RE-ENTER BACK TO WORK

RETURNING TO WORK AS A RETIREE – Colleges and departments have the option to employ retirees as returning retirees under certain guidelines or through the normal employment process with a regular faculty/staff title.

PAID and/or UNPAID LEAVES – Leaves that support a better integration of work and family provide staff to temporarily leave work due to personal, medical and/or family demands. Require pre-approval from the college or unit in advance.

Refer to <http://hr.osu.edu/policy/index.aspx> for more detailed information about the following leaves:

[HR Policy 6.05 - Family and Medical Leave](#) – Provides eligible faculty and staff up to 12 work weeks (480 hours) of leave (can be paid or unpaid) during any 12 month period for one or more of the following qualifying status changes: a serious personal health condition that prevents an employee from performing his/her job, care for a young child during the first year following birth, adoption, or foster care placement care of a family member with a serious health condition. The university also offers an employee paid short term disability (STD) benefit and a university paid long term disability (LTD) benefit for employees. For more information about STD and LTD, contact Integrated Disability at 292-7254.

[HR Policy 6.27 - Paid Leave Program](#) – Provides paid vacation, sick, jury duty/court appearance, and organ donation to respond to employee needs.

[HR Policy 6.27a - Paid Leave Programs: Vacation Donation](#) – Provides financial assistance during approved unpaid leaves related to life-threatening illness or injury to self or immediate family members, for childbirth, adoption, and foster care placement or death of an immediate family member.

[HR Policy 6.27b - Paid Leave Programs: Parental Leave](#) - Provides a birth mother, father, domestic partner or adoptive parent with paid time off to recover from childbirth and/or to care for and bond with a newborn or newly-adopted child.

[HR Policy 6.45 – Unpaid Leave policy](#) – Faculty and staff may request a leave without pay for personal and medical reasons.

BENEFITS	-Offers the employee a leave of absence that allows for a return to the same or similar position within a predetermined time period. Allows the employee time away from work to address personal or medical needs and or time for professional development.
CHALLENGES	- Leave may be paid or unpaid depending on sick/vacation accrual and the type of leave needed. Job duties may need to be reassigned while the employee is on leave.
LEAVES REQUIRE APPROVAL	Typically you must submit proper documentation to facilitate processing and approval of your leave request. Depending on the type of leave, a request can be denied.

FLEXIBILITY IN THE NUMBER OF HOURS WORKED

REDUCED WORK SCHEDULE – Allows the employee to work less than the typical 100% FTE. Some positions can be negotiated to a 9, 10 or 11 month appointment to be paid over 12 months. Other positions can be 41, 42, 44, 46, 48 weeks. At OSU, a 75% appointment (30hrs/wk) enables the employee to retain the same level of benefits with no increased cost. A 50% -74% appointment (20–29 hrs/wk) enables the employee access to full benefits on a prorated cost formula.

Common part-time schedules:

- Hire as part-time appointment position.
- Negotiate a permanent reduction in appointment or hours.
- Negotiate a temporary reduction in appointment or hours for a specific time period for medical, personal and/or professional needs.

JOB SHARING – Allows two employees to share responsibilities of one regular full-time position. Allows for recruitment and retention of two valued staff and increases the breadth of skills and experience for the one position.

Common job sharing arrangements:

- Two employees work half of a regularly scheduled full-time job with no overlaps (e.g. 2- ½ days each).
- Two employees work 3 days per week, with one day overlapping when both employees work.

<p>BENEFITS TO REDUCED WORK and JOB SHARING</p>	<p>-Provides more time for personal responsibilities. - Provides flexibility to alter schedule for home or work demands. - Both job-share partners, if working at least 50% time are eligible for healthcare benefits. -Job sharers gain a partner with whom to share ideas and responsibilities.</p>
<p>CHALLENGES</p>	<p>- Assigning job duties proportionate to the hours worked. - May require more management supervision. -Finding a compatible partner to job share a position.</p>
<p>DISCONTINUATION</p>	<p>- May become unfeasible at any time and may be discontinued at the discretion of the employee or manager.</p>



FLEXIBLE WORK ARRANGEMENT PROPOSAL

(To be submitted by the staff member)

Name: _____ Title: _____ Date: _____

College or Unit Manager/Director: _____

The Flexible Work Arrangement Proposal Form is to be utilized when a staff member is requesting a change to their regularly scheduled work hours and/or setting. (This form should not be utilized to support infrequent requests from staff members regarding a specific need to work differing hours and/or from an alternate place of work. Management may consider infrequent requests to address sporadic needs on an as needed basis.) The college or unit human resource professional should be consulted to ensure that the request consideration process proceeds in a timely fashion and confirming that the final outcome of a request has been communicated to the staff member. The Office of Human Resources, Work Life unit is also available to answer questions as well as provide guidance to staff regarding requests to be considered for a flexible work arrangement.

1	Clearly define the flexible work arrangement.
2	What are the reasons for the request? (If reasons are particularly personal or sensitive, a staff member may choose to simply respond “personal” and elect to meet with either the department Manager/Director of the college of unit human resources department to verbally explain.)
3	How long is the flexible work arrangement expected to last? (Be as specific and accurate as possible.) If duration unknown, temporary arrangements in 3 month increments are acceptable.
4	Select from one or more of the options detailed on the next page:

Flextime – Allows faculty and staff the flexibility in arrival, departure and/or lunch times.

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- **Variable Day** – Consistent schedule of a different number of hours each day as long as the employee achieves the expected # of hours within the week. (e.g. Monday, Wednesday 10 hrs, Tuesday, Friday 8 hrs and Thursday 4 hrs).
- **Mid-Day** – The employee may take a longer scheduled lunch break than usual if they make up the extra time by starting work earlier or staying later (e.g. work 8-12, break 12-2pm, work 2-6pm).

Compressed Work Schedule- Gives the employee the ability to work their normal full-time appointment in fewer than 5 days per week.

Common arrangements:

- A full-time schedule of work is accomplished by working four 10 hour days.
- A full-time schedule of work is accomplished over two weeks by working 80 hours in nine days. (e.g., work eight 9-hour days plus one 8-hour day).

Telecommuting (Flexplace) – Allows for a portion or the entire job to be performed off-site (typically at one's home) on a regular, recurring basis while remaining connected to the college/unit via computer, fax and/or telephone.

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- Regularly work at home one to five days a week.
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Reduced Work Schedule - Allows the employee to work less than the typical 100% FTE. Some positions can be negotiated to a 9, 10 or 11 month appointment to be paid over 12 months. Other positions can be 41, 42, 44, 46, 48 weeks. At OSU, a 75% appointment (30hrs/wk) enables the employee to retain the same level of benefits with no increased cost. A 50% -74% appointment (20–29 hrs/wk) enables the employee access to full benefits on a prorated cost formula.

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Job Sharing - Allows two employees to share responsibilities of one regular full-time position. Allows for recruitment and retention of two valued staff and increases the breadth of skills and experience for the one position.

Common job sharing arrangements:

- Two employees work half of a regularly scheduled full-time job with no overlaps (e.g. 2-½ days each).
- Two employees work 3 days per week, with one day overlapping when both employees work.

5	Describe the actual proposed work schedule			
	Day	Hours	On-site	Off-site
	Sunday			
	Monday			
	Tuesday			
	Wednesday			
	Thursday			
	Friday			
	Saturday			
	Total Hours			
6	From your perspective, detail the anticipated needs/considerations related to your request. How will your request enhance your ability to complete your work or meet enhanced services?			
	A. Your department Manager's/Director's needs/considerations.			
	B. Your co-workers' needs/considerations.			
	C. Your customers' needs/considerations.			

7	Are there any gaps between your needs and the needs of any other person or group as it relates to this request for a flexible arrangement?	
8	If gaps exist, these represent obstacles and may result in denial of your request. How do you propose to resolve/address them?	
9	<p>If the request involves work at an off-site location, answer the following:</p> <p>A: What elements of the job can be performed off-site? Which cannot?</p> <p>B: Where will the work be conducted?</p> <p>C: What tools, equipment and technology will be needed for work to be completed?</p> <p>D: Have arrangements been made for dependant care?</p> <p>E: Have arrangements been made to allow a return to the office to address urgent business needs if required by department management?</p> <p>F: How will the computer, software, databases and other technology utilized to perform work be secured and protected from use by other individuals?</p>	
10	<p>Consider the benefits as well as the costs or disadvantages that may occur based on your proposed flexible work arrangement.</p> <p>Benefits</p> <p>For customers:</p> <p>For me:</p> <p>For co-workers:</p>	<p>Costs/Disadvantages</p> <p>For the organization:</p> <p>For me:</p> <p>For co-workers:</p>
11	If this flexible work arrangement request is approved, detail any goals, work assignments, metrics, and/or other issue that may require consideration or change.	

I understand that this request will be considered and approved at the sole discretion of management, and that any Flexible Work Agreement, proposed or approved, does not change my basic employment-at-will status with the organization.

_____ Staff Member Name	_____ Signature	_____ Date
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_____ Supervisor Name	_____ Signature	_____ Date
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Office of Research/VP Unit:

Approved Not Approved

Comments:

_____ Approver Name	_____ Signature	_____ Date
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EMPLOYEE'S NAME
FLEXIBLE WORK AGREEMENT

The University, recognizing the value and worth of our employees strongly encourages the use of flexible work arrangements as one approach to supporting work life effectiveness, to improving staff morale and to recruit and retain a high quality workforce. OSU recognizes that flexible work arrangements are a key management strategy that positively affects staff performance and commitment back to the university. It is the intent of this mutually beneficial agreement to clarify the duration, schedule and goals of the flexible work arrangement. You will begin this flexible work arrangement on *insert date* and it will last for *insert duration (temporary 90 day or annual)* unless you and or your manager determine that this working agreement is no longer mutually beneficial.

Employee's Name will be working a (insert type of schedule...choose from flexitime/compressed/telecommuting/reduced work/job sharing) as defined below.

(Insert Duration in weeks, months or on an annual basis, include the name, position title/duties and the type of flexible schedule in this section)

Her manager, ***insert name***, has agreed to the following parameters to the agreement:

- *The details of your actual alternative schedule...*
- *Initial assignments include. Be specific about work expectations and deadlines for completion*
- *College/Unit and employee will benefit from this new arrangement by...*
- *Potential challenges/ solutions...*
- *Use of any applicable leave balances, changes to benefits, salary etc*

The flexible work arrangement will be reevaluated (*insert timeframe or date*) to ensure that it continues to met the employee and college/unit demands

Manager Responsibilities- To provide supportive and direct coaching, help the employee organize work when necessary, define clear expectations and timeframes for completing work and provide necessary resources to perform work. Communicate the work arrangement to customers, co-workers and management that may be affected by the new schedule. Evaluate the effectiveness of the flexible work arrangement to assess needs and discuss potential concerns.

Employee Responsibilities – Employee is responsible for maintaining availability, levels of production at the expected standard and quality of work. Inadequate availability, reduced work production and/or work quality may be cause for modification or termination of employee’s participation in this arrangement. Communicate the new work arrangement to customers, co-workers and management that may be affected by the new schedule. The employee is expected to adhere to program guidelines and abide by existing University policies and procedure that relate to absence from work.

Employee Date

Manager Date