



Overcoming the
Implementation Gap:

How 20 Leading Companies
Are Making Flexibility Work

BOSTON COLLEGE CENTER FOR WORK & FAMILY

Acknowledgments

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Contributing Staff

Authors

Fredric R. Van Deusen, MBA
Jacquelyn B. James, Ph.D.
Nadia Gill, M.Ed.
Sharon P. McKechnie, Ph.D.

Executive Director, Boston College Center for Work & Family

Brad Harrington, Ed.D.

Graphic Design

Thomas Payne

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Overview of the Report

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.

This report presents:

- A brief literature review of research about the effectiveness of flexible work arrangements
- Insights drawn from commonalities among the successful implementers
 - 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
- Detailed descriptions of 20 model flexibility programs. For each exemplar, we also include:
 - Drivers of the initiative
 - Obstacles faced and overcome
 - Recommendations for effective implementation
 - Perceived benefits to the organization.
- Compelling quotations from managers and employees who hail the success of the programs
 - Reluctant managers who are won over
 - Grateful employees who are loyal to the company

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	9/8o 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.

Executive Summary

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.

What Is New and Different about this Study?

There is little to no research available that describes what occurs between setting up a flexibility policy and making it work. Moreover, in a major review of the business case for the integration of employee assistance, work-life, and wellness services, Attridge (2005) concluded that *“the nature of how the program is implemented appears to be the most significant driver of getting results”* (p. 47). Thus, this project was designed to understand better the course of successful implementations in the words of the implementers themselves along with the reactions of both employees who found the programs useful and their managers who had to adjust to new ways of working.

Our overarching focus is: What makes a successful program work for the employee and the business? To answer the question, we provide in-depth information from implementers, employees, and managers in 20 leading companies in the United States, most of whom are members of the Boston College Center for Work & Family National Roundtable. We asked each company representative if he or she had one or more programs for working flexibly that was deemed to be highly successful, i.e., “worth bragging about,” a program that worked well for both employees and the business. 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.

What Flexible Work Arrangements Did We Study?

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. In this report, the term “flexible work arrangement” refers to some fairly well-established approaches such as compressed workweek, part-time work, job-sharing, phased retirement, and telecommuting. The report also documents, however, newer approaches such as “Personal Pursuits Program,” “New-parent Re-Integration,” the “BOLD Initiative,” and the “Results-Only Work Environment,” along with some innovative approaches to implementing an array of programs.

What Is the Business Case for Flexibility?

There have been many studies that have shown the benefits of flexible work arrangements. Families and Work Institute in 2002 found that **employees with more access to flexible work arrangements are more committed to their current employers**—more loyal and willing to work harder than required to help their employers succeed. Deloitte & Touche has estimated a **savings of \$41.5 million in turnover costs alone** by retaining employees who would have left if they did not have a flexible work arrangement (Corporate Voices, 2005). A study conducted by the Center for Work & Family in 2000 found that **70% of managers and 87% of employees reported that working a flexible work arrangement had a positive or very positive impact on productivity**. For men in their 20s and 30s and women in their 20s, 30s, and 40s, **the most important job characteristic is having a work schedule that allows them to spend time with their families** (Radcliffe Public Policy Center with Harris Interactive, 2000, p. 2). A survey of **senior Fortune 500 male executives** (Miller & Miller, 2005) had some surprising results.

- Fully 84% say they'd like job options that let them realize their professional aspirations while having more time for things outside of work.
- 55% say they're willing to sacrifice their income.
- Half say they wonder if the sacrifices they have made for their careers are worth it.
- In addition, 73% believe it's possible to restructure senior management jobs in ways that would both increase productivity and make more time available for life outside the office.
- 87% believe that companies that enable such changes will have a competitive advantage in attracting talent.
- Other interviews suggest that the younger a male executive is, the more likely he is to say he cares about all of this.

Companies need employees to be flexible in order to accommodate market and organization changes. But, perhaps the most compelling business case argument is a simple one. Younger workers (and many others) are demanding more flexibility, and some companies are doing a very good job of meeting their needs. In order to be competitive, and attract and retain the future workforce, having effective flexible work arrangements is not just an option, it's a necessity.

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

Conduct needed research. 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.

Gain commitment for the program. 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

indicate that leaders and managers can be successfully educated and even turned from resisters into supporters. In fact, managers who are initially resistant and are convinced of the merits of the program may well become the most ardent supporters. One of our respondents made the following suggestion:

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.

In constructing the business case our respondents had the following suggestions:

- Find out the business needs, what leaders are striving toward, what is driving the need for the program.
- Position the FWA as a solution to a business problem.
- Connect the dots from the business need to the FWA.
- Try to calculate the cost of not doing the FWA (e.g., turnover costs).
- Be creative. Use terminology that will work for the audience (e.g., how effective people will be as opposed to work-life balance).

Design the program. In designing the program, one of the most difficult issues identified by our respondents was the decision as to how prescriptive to be with the policies and procedures. A common inclination was to spell everything out, but in the end, what seemed to work best was to **adopt fairly flexible policies and guidelines that would meet a variety of situational needs**. In every case, the success of the program hinges on a manager and an employee coming to an agreement that will work for each of them. The flexible work arrangement itself must be flexible. Do not take a cookie-cutter approach.

Our respondents indicated that they had to find a way to make the new way of working the *expected way of working*. They said that this can be accomplished by **integrating the new work arrangements into existing systems in a way that encourages their use**.

Another element of success mentioned by several respondents is the importance of **revising performance management systems so that objective goals are rewarded instead of face time**. It was interesting to note that the employees we interviewed understood very well that the relationship needed to work both ways. They were happy to be flexible to meet their manager's needs if the manager was flexible about meeting their needs.

Implement the Program. According to our respondents, a key to successful program implementation is **establishing the needed infrastructure** to put the program in place and manage it once it has been implemented. Some companies found it helpful to convene a cross-organizational team to assist with final design and implementation.

In determining how to **roll out the program**, most companies also **piloted the effort** before implementing it more widely. That enabled them to understand better the issues and challenges, and what else needed to be included. Some respondents spoke of the value of using teams or work units within the organization to facilitate the implementation process by figuring out for themselves what will work effectively.

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.

Monitor and Improve the Program. 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. Most of our respondents recognized that this is the way forward for companies that want to retain top talent, including both older and younger workers.

Ann Bamsberger, vice president of the Open Work Solutions Group at Sun Microsystems, states in a June 2007 article from *HR Magazine* titled **Clocking Out**:

This is the next-generation HR. I keep telling other HR professionals, "Stop fretting about comp and benefits; this is the future." This is the kind of stuff they have been wanting to do for years and years. The talk in HR has always been how to become more of a strategic partner. Well, this is how to do that. This is a terrific opportunity for HR to participate in creating a new work environment.

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 *Work-Life Evolution Study*, 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 workloads
	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	Buy-in from the managers	Top-down support; continued communication of best practices	Start at the top and share with senior leaders the FWA success of other companies; talk to employees to understand their needs
Consulting environment where part-time as % of 40 hours was not fair to full-time workers	Confusion about how the program works	The programs fills the needs and is actively supported by many senior leaders	Make sure it fits with current culture and business needs; must be a “solution to a business problem”
Originally implemented at AT&T to help recruit telephone operators	Head count treats part-time same as full-time	Long history of having the part-time policy; decision and approval kept at supervisor level	Head count policy needs to support part-time work; arrangements need to benefit both company and employee
Attract qualified people to reach physician market effectively and cost-efficiently	Funding considerations as to which brands will fund the sales force	Program entirely driven by business needs; lots of positive momentum	Don't view these employees as part-timers but as salespeople who happen to work part-time
Wanted to retain a higher % of workers starting families	Managers were concerned that too many employees would take advantage of this	Senior manager support in both field and home office; gradual increase in use	Hard to get going– need guidelines, management buy-in, and investment
Help employees meet their lifestyle needs while still meeting business objectives	Business needs may change and no longer allow this for some positions	Positive results from the programs; employee initiation leads to strong motivation to make it work	Survey employees to understand their needs; always work at the top and get approval and a champion
Provide an additional flex option to employees and formalize the program	Gaining consensus on program design; initial manager hesitation on how to implement	Supportive culture; senior leaders support and communicate	Do your research; learn company culture; socialize the concept with many different groups

	Company	Program	Description	Benefits
TELEWORKING	Eli Lilly and Company	Teleworking	Employees work full-time at home	Retention, loyalty, productivity, recruitment, company branding
	Dell Inc.	Virtual Call Centers	Employees work from home on the same schedule as if they were at work	Productivity and cost improvement; culture changes; attraction; retention
ON- AND OFF-RAMP PROGRAMS	Deloitte & Touche USA LLP	Personal Pursuits Program	Maintains connection with people who leave the firm (for child or elder care)	Former employees keep their business contacts and have a facilitated way to get certifications
	Intel Corporation	New Parent Reintegration	Employees can work part-time or adjust hours after pregnancy or parental leave	Productivity, recruitment, retention, and company image
	MITRE Corporation	Phased Retirement	Employees aged 59½ can reduce hours and begin collecting retirement benefits	Retain capable employees and their knowledge for a longer period of time
ALTERNATIVE WORK SCHEDULES	Raytheon Company	9/80 Work Schedule	Employees work 80 hours in nine days and get Fridays off every other week	Retention, recruitment, employee satisfaction, reduces Friday traffic
LINKED BUSINESS RESULTS AND FLEXIBILITY	American Airlines	BOLD Initiative	Teams define both improvement goals and desired flexibility arrangements	Cost savings, productivity, retention, teamwork, morale

Drivers	Obstacles	Success Factors	Recommendations
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	CEO champion; perseverance; getting IT on board; training	Have data to show business case; need performance mgmt. system focused on results
Benchmarking by execs showed potential cost and productivity gains	Management resistance; getting right technology; culture acceptance	Thoughtful design of program; management buy-in	Set up a strong core group for implementation; get needed support at all levels
Recoup investment in people; will become harder to recruit people in next generation	Gaining access to the intranet for people who have left; keeping program visible	Sound program that meets a business need; program initiated by top management	Find a champion even if you need to recruit him/her yourself; focus on business needs
Retention surveys of women indicated difficulty in returning full-time after leave	Finding the right balance in how prescriptive to be in communicating the program	Persistence, consistent messaging, flexible approach, senior mgmt. involvement	Have a flexible approach driven by employee needs; make sure there is real commitment
Employees requested it and the company found it could be easily implemented	Very few obstacles other than doing the needed research on plans and regulations	Low program cost and ease of administration	Survey employees to see if there is a need; enable part-time work with retirement benefits
Company president initiated this to help recruitment and retention	Potential impact on customers; workers with scheduling issues; long work days	Rolling it out to everyone at once; making it the expected way to work	Management must be part of the vision; be aware of all labor laws; form a strong team for implementation
Company needed both improved productivity and a new way of functioning	Culture, current policies, resistance by managers and employees, equity	Combining improvement and flexibility; team approach	Start small and let it spread naturally; communicate very well up front; don't take a cookie-cutter approach

	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
	Takeda Pharmaceuticals	Work Paths	Broad FWA program includes telecommuting, job-sharing, part-time	Employee satisfaction, improved morale and commitment, employee retention
IMPLEMENTATION OF FLEXIBLE WORK ARRANGEMENTS	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 on Flexibility in the Context of a Changing World

Today's global economy and information age, fueled in part by increasingly sophisticated technological advancements and the changing demographics of workers, has required leading organizations to rethink how they do business in order to stay competitive (Hall & Mirvis, 1996; Rifkin, 1995; Sennett, 1998). Such change has included, among other things, the development of flexibility in the workplace. Many companies have been working at this transition over many years. Indeed, there has been much study and focus on the impact of flexible work arrangements on the employee, the business itself, and on families.

For the last year, we have been involved in conversations with representatives of 20 leading organizations about their approaches to facing some of these challenges. We begin by summarizing a few of the challenges mentioned by our respondents, followed by a succinct summary of research findings from different sources and perspectives about the value of such arrangements, and the need for the kind of investigation that we performed for this report.

Changing Needs of Employees. Many of the representatives of leading organizations we interviewed mentioned the fact that the “mind-set of employees is different now than it was in the past.” From employee surveys and focus groups, senior managers are learning that employees' needs have changed and with them their requirements for staying with the organization. One organization was surprised to learn the extent of changes that had occurred in their workforce, i.e., it is no longer a “company made up largely of men with stay-at-home wives,” but in fact had a diverse population with all kinds of situations and needs. Other companies are discovering the changing needs of an aging workforce and are being asked for phased retirement and other more subtle transitions to retirement. At the other end of the spectrum, another participant noted that the company had a “large number of employees in their 30s who want to settle down and have a family”; the retention of all such employees is a major challenge, a subject that we will return to later in the report.

Managers today are hearing that employees want more autonomy and control over how they get their work done; employees are asking for more trust—“[to be] trusted to do their work and to make choices about living their lives...feeling constrained by the traditional work environment.” They want to be empowered to make decisions and do their work in a way that makes sense to them. Employees are telling companies that they want “help in taking care of their work and family responsibilities.” How to accomplish these ends without compromising business goals was a challenge repeated many times over.

Changes in the Business Context. Globalization has been widely heralded and discussed. It was, of course, foremost in the minds of our respondents. For many of our organizations, the requirement that they work globally and support both employees and customers in different time zones has also prompted them to figure out new ways of working. Almost in concert with the evolution of the global economy is the dramatic change that technological advances have wrought, most especially the ability to work anywhere, anytime. Rapidly changing technological innovations, along with the new global context, were mentioned in one way or another by almost all our respondents.

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 Americans with Disabilities Act, and new pressures such as state-mandated health care requirements.

Pressures to Stay Competitive. Of course, the need to be successful as a business is always paramount in the minds of our respondents, and some of them mentioned other changes in the business context having to do with the ubiquitous pressure to increase productivity. One organizational representative, for example, mentioned the massive effort for “continuous improvement” the company had initiated after the experience of the 9/11/2001 terrorist attacks on the United States. Out of that work grew new pressures to create cooperative teams. In her words, “...these...things ... are very difficult to change because they are so deeply entrenched in an 80-year-old culture.”

In another example of the kinds of business pressures companies face, one of our respondents described the experience her organization had of learning that other similar organizations were successfully cutting costs and increasing profits by allowing certain units to work virtually. As a result, her company felt challenged to do the same.

And finally, another organization learned from some internal analyses that their most successful financial service centers were those where the customers were very loyal; what they discovered was that *customer* loyalty went hand in hand with *employee* loyalty. The company leaders concluded that their new challenge was to “keep their employees,” and that by doing so, they would be able to “keep their customers and create profitability.”

Employee Recruitment and Retention. As the above example illustrates, finding and keeping good employees constitutes yet another challenge in the changing context of business today. Perhaps our respondents were most vocal about this challenge. One of our respondents put it this way, “The demographic facts of the next generation will make it harder to recruit good people,” these facts being fewer potential applicants, and different needs and expectations of the available applicants. This respondent also mentioned the investment that a company makes in an employee and the challenge inherent in trying to recoup that cost: “If people leave and come back, the company recovers at least \$150,000 in costs.” Another respondent mentioned the need to find workers to cover all the 24-hour, 7-days-a-week shifts, positions that are staffed primarily by women. What can they do to attract and keep such “valued workers”? Actions are needed to keep such workers who have a “unique skill set” and who might leave if certain conditions are not met. In an unusual move, one company representative described a challenge that she faced some years ago to find qualified people who are willing to work part-time, and who are able to reach a particular market effectively. “At the time there were a

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 same time. Many of our respondents spoke of the continuing challenge of retaining qualified women and minorities.

Are Flexible Work Arrangements the Solution?

Overwhelmingly, our respondents have turned to the development and implementation of a wide variety of flexible work arrangements (FWAs) as one among many approaches to the challenges described above. This process has been evolving over the last 15-20 years. As we have seen in the words of the employers with whom we spoke, organizations are recognizing the business imperative to help their employees better negotiate and integrate demanding work and family responsibilities (see also Hall & Mirvis, 1996; Jacobs & Gerson, 2004; Nord, Fox, Phoenix, & Viano, 2002). FWAs have been seen as the answer to the need to work in the 24/7 global work environment by allowing employees to work odd hours from various locations, including home. Teleworking has also been seen as a way to reduce the number of people driving on highways, clogging employee parking lots, and driving up real estate costs for the organization. These are but a few of the ways that our respondents illuminated their responses to current organizational challenges.

Indeed, one of the hottest buzzwords in the workplace today is “flexibility.” As Harrington & Hall (2007) have pointed out, a key characteristic of today’s business model is “flexibility,” but is it taking hold? If leading organizations have had the availability of flexible work arrangements over many years, why is it still the topic of so much conversation in the business environment? Why is it still on the “want-to-know more” list of our member organizations? There is some concern that, like many good ideas, the implementation of flexible work arrangements in the context of the challenges and pressures mentioned above has been more difficult than we realized. Some have concluded that forward-thinking organizations have established flexibility programs without thinking simultaneously about strategies for making them work.

In the following section, we turn to a brief review of scholarship both from business and academic settings to shed light on some of the whys and wherefores of the situation we now face with respect to flexible work arrangements.

What Do We Know about Flexibility and How Do We Know It?

There has been a burgeoning of research over the past 30 years examining issues related to the changing lives of American workers, both the needs of employers and employees. The last decade, in particular, has seen an expansion of research related to work-life balance concerns and flexible work arrangements (Perry-Jenkins, Repetti, & Crouter, 2000; Swanberg, Pitt-Catsouphes, & Drescher-Burke, 2005). Although this is somewhat of an oversimplification, there are two main sources of data for this research.

First, there is internal/organizational/corporate-based research with employees, which asks mostly about work-related issues. Much of the good news about the benefits to business for implementing flexible work arrangements can be found among these studies. In this type of research both data and

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 skilled employees, decrease “negative spillover” from home to work (as well as from work to home), and improve mental health (for an overview of much of this and other work, see Burud & Tumolo, 2004). Specifically, an internal analysis by Deloitte & Touche showed that 86% of their professional employees cited workplace flexibility as a major reason for staying with the firm; this contributed an estimated \$41.5 million savings in turnover-related costs during fiscal year 2003 (Corporate Voices, 2005). And, a study of *Leaders in a Global Economy* conducted by the Boston College Center for Work & Family with the Families and Work Institute and Catalyst in 2003, showed that 60% of high-level executives without flexibility indicated they planned to leave their organizations in five years, vs. 49% with flexibility (Galinsky, Salmond, Bond, Kropf, Moore, & Harrington, 2003).

Corporate Voices for Working Families compiled a descriptive summary of findings from among partners in their organization to review the kinds of data these companies were collecting about flexible work arrangements and assess the extent to which the availability of these types of programs enhanced business objectives (Corporate Voices, 2005). Summarizing across 29 companies, they reported that the availability of FWAs can dramatically affect intent to turnover, recruitment, employee satisfaction, company commitment, and stress levels (see also DTI, 2003). Moreover, some companies show substantial cost savings. AstraZeneca and Deloitte & Touche, for example, have very impressive models for showing financial gains. The authors of the Corporate Voices report conclude that: “The data presented in this report establish a compelling business case for expanding workplace flexibility. In fact, the body of evidence is so weighty that it constitutes an action imperative for organizations that want to stay competitive, get the best from employees, and improve business results” (Corporate Voices, 2005). These authors go so far as to call for an end to the debate on the utility of workplace flexibility.

Academic Research. In academic research, there are many positive findings about flexibility and flexible work arrangements as well. A number of studies suggest a positive relationship between flexible work arrangements and reduced stress, decreased negative spillover from work to family, greater work-family balance, less work-family conflict, and enhanced physical and/or mental well-being (Almer & Kaplan, 2002; Bond, Thompson, Galinsky, & Prottas, 2002; Thomas & Ganster, 1995). Specifically, using a composite index to measure flexibility, Litchfield and Pitt-Catsouphes (2000) found a positive relationship between flexibility and perceptions of stress (lower), work-family balance, and overall life satisfaction (both higher). Similarly, in a study of hourly and professional workers in a national retail chain, James, Swanberg and McKechnie (2007) found that workers with flexibility reported higher psychological well-being than those without flexible work options. Interestingly,

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 organizational representatives “responded ‘very true’ when asked whether management rewards those within the organization who support flexible work arrangements and even fewer (27%) feel that their organization makes a real and ongoing effort to inform employees of the availability of work life assistance” (NSE, 2005, p.19).

Closing the Implementation Gap. In summary, on the one hand, we have much organizational and academic research attesting to the benefits to both the employee and the employer in implementing FWAs with respect to enhanced job satisfaction and mental/physical well-being; reduced stress levels and work/family conflict; greater productivity and commitment; and, lower absenteeism and turnover. We also have data indicating that American workers are *feeling* increasingly overworked and are looking for greater workplace flexibility—so much so that they might, paradoxically, “be willing to work more in exchange for greater flexibility” (Jacobs & Gerson, 2004, p.100). In contrast to these findings, we have data that indicate the uncertain or poor value of various FWAs; utilization and access problems; and, organizational climate or cultures that constrain their use.

We are seeing that it takes more than establishing programs and policies—making FWAs work requires an all-out company effort. Some believe we need government interventions as well (see, for example, Workplace 2010). Getting from espoused theory (the flexibility program) to practice (wide usability without penalty) may take looking beyond traditional ideas of “flexibility.” As we have mentioned, our participants revealed a broad array of programs that they indicated were developed in response to business imperatives. They said that these programs and new ways of working were necessary to remain competitive. We know too little about effective implementation of these flexible work arrangement programs.

Little research seems to exist regarding how to carry out FWAs without compromising business outcomes. This problem has been called the “implementation gap” (Lewis & Haas, 2005, p. 350). The research that is available suggests that sound, clear procedures and good communication strategies can be key factors in effective implementation (Nord et al., 2002). This involves communication not only to employees (both users and nonusers of the programs), but also with clients/customers. We are also seeing that it is important that all employees see the new work arrangements as being fairly and equitably distributed (Judge & Colquitt, 2004), and not a threat to career advancement (Glass, 2004). Clients need to retain faith in the organization to meet their needs.

Organizations need assurance that the use of FWAs does not translate into “less work,” or lower productivity. Without employee, client, and company confidence, the new workplace culture of FWAs can be easily undermined. Additionally, success with FWAs might necessitate a transformation of current HR processes and support from top management (Nord et al., 2002). Finally, research indicates that organizations should be ready to put in place the appropriate infrastructure needed to address the technical demands of various FWAs (i.e., telecommuting).

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 Eleven Essential Steps to Designing a Successful Work-Life Program,”** and other studies of success. DTI (2003), for example, provides a list of 50 companies with a brief anecdote about the positive impact of flexibility. Burud and Tumulo (2004) describe cases of executive transformations in five corporations.

There is little to no research, however, about what goes on between setting up a policy and making it work. Moreover, in a major review of the business case for the integration of employee assistance, work-life, and wellness services, Attridge (2005) concluded that “the nature of how the program is implemented appears to be the most significant driver of getting results” (p. 47). Thus, this project was designed to understand better the course of successful implementations in the words of the implementers themselves along with the reactions of both employees who found the programs useful and their managers who had to adjust to new ways of working.

Our overarching focus is: What makes a successful program work for the employee and the business? To answer, we provide in-depth information from implementers, employees, and managers in 20 leading companies in the United States.

How 20 Leading Companies Are Making Flexibility Work

Introduction

The company representatives with whom we spoke generously provided us with their own thoughts about what made their programs both available and usable. Among the interviews, patterns emerged that were common across at least several companies. There were, for example, similar steps taken in several instances for getting started and seeing the program through. Always paramount in the minds of our respondents was making the program both useful to the employee and beneficial to the employer.

There were obstacles to unearth and overcome, such as managers' resistance and employee skepticism and fear. There were suggestions for constructing a compelling business case and getting support from leadership and other groups within the organization. There were suggestions for designing the program and carrying it out, for communication strategies that worked, and for monitoring and sustaining the program.

There was considerable overlap in the respondents' reports of the benefits gained from the various flexible work arrangements: improved employee satisfaction, engagement, retention, and recruitment; gains in productivity and competitiveness; and in some cases even improved customer satisfaction primarily due to reduced employee turnover.

From these patterns that we discerned from our interviews, we present in this section a summary of recommendations, suggestions, and tips from our respondents who believed that they had a program that really worked, that was both widely available and usable without penalty. While not meant to be a step-by-step guide, the recommendations do seem to represent ways to fill in the gap between setting up a program and making it effective. The suggestions, recommendations, and tips have been organized into the following five sections:

- 1. Conduct needed research**
- 2. Gain commitment for the program**
- 3. Design the program**
- 4. Implement the program**
- 5. Monitor and improve the program**

I. Conduct Needed Research

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.

[One of the biggest obstacles we faced was] managers' initial hesitancy around how to implement the program. Did it mean that everyone had access to [the program] if they asked for it? How could they say no?

Employees have some concerns as well.

People were afraid. They asked: Does the boss know we are doing this? Is he really all right with it?

Thus, our respondents noted the importance of taking stock of the culture in which the flexible work arrangement will be embedded. Some questions to ask include: Is the shift to this new way of working a major change? How will it be received? What obstacles will there be? What can I tell my co-workers and leaders about FWAs that have been implemented by other companies? What changes need to be made to make FWAs not just available, but acceptable to use? These and other questions help to illuminate what might be involved in changing the company culture. One of our respondents said it this way:

Know your work force. Know your organizational culture and what it can tolerate so that you're not overselling various types of FWAs.

One manager who was persuaded to try one of these new approaches to management said, "I don't think I'll ever be the same. Because of [the cultural shift] I'll see the world differently whereas if I hadn't been a part of it, I'm not sure I would have...[at the very least] it would have taken a lot longer." One respondent referred to the very positive impact of making work-life issues front and center in the organization: "I think [the difference] is more broadly the culture. People have a very positive opinion of the culture, and much of that, or at least some of that, has to do with certainly the way that we treat people and the options that we provide to them."

Culture is indeed hard to change. In some cases, a reluctant manager resisted the change. One human resource manager with whom we spoke said that she had to work with management to make it acceptable to allow some employees to be more "flexible" than others. She said that this process is part of the responsibility of the leaders in HR—to make such arrangements part of the culture, "you know, a company culture can help them to be more comfortable with that."

A human resource representative from a different organization told us that she and her co-workers were trying to change the mind-set of the leadership of the organization—"and that what we are trying to address is—how do we get this whole mind-set, this culture change around; how does it get to be a win-win; how does it get to be a win for the business, a win for the employee? But until we get the managers to break that, we still have a lot of skeptics out there."

Some leaders seemed to represent a "stodgy culture," one that is reluctant to make a change when things seem to be working relatively well. In the words of one respondent, "It's an attitude of 'If it ain't broke, don't fix it' kind of thing." In this same culture, there is the expectation that it's easy to get someone within a moment's notice. They get concerned that if "you can't get someone right there at that particular moment it is actually an uneasy [feeling] for them." Similarly, one interviewee who

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.

Identify Obstacles and How to Overcome Them

Our respondents described numerous obstacles to success in the implementation of these programs. The section below presents some of the common obstacles that members of this study encountered and the steps they took to overcome them. Many of these obstacles can be anticipated, and the steps to overcome or avoid them included in an overall implementation plan.

Obstacle: Management resistance.

As mentioned, one of the biggest obstacles to be overcome is often management resistance to the new program. The quotations below contain activities taken by our survey respondents to overcome this obstacle.

Training that includes the business case and best practices

And I think, once they saw— went through the training and saw the business case, and saw the best practices that other companies, that they really saw, hey, this might be exactly what we need because we could prove the link between keeping our employees, keeping our customers and our profitability, and who doesn't want to be profitable?

Use scenarios

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.

Find out what managers' fears are

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. Many employees cannot afford to take a job-sharing position because it changes their pay scale.

Encourage the use of objective performance goals

The "line-of-sight" management issue was harder to address, and is still present to some extent. Resulting from a separate initiative, the performance management process had already been revamped to make it much more outcome-based and less activity-based.

Give managers discretion

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... 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.

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.

Obstacle: Employee skepticism and fear.

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.

Obstacle: Technology difficulties.

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.

Obstacle: Potential impact on customers.

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.

Obstacle: Cultural resistance to major change.

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.

General downsides.

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 piece of work that you've added to your plate.

Concerns were often raised about perceived unfairness. Some employees wonder why others have this benefit but it may not be available to them. Often some jobs simply do not allow for the desired flexible work arrangements.

We've had new mothers—managers that have come up and said, you know what, I'd really like is to work one day in the office and four days at home. And we've had to go back and say—well, here's the deal. If you want to do that, then you can't be a manager of folks anymore. That's not going to cut it. Now, we can work around one day a week at home. We can make that happen. But this is getting a little bit excessive. You're going to miss out on too much now. You're very talented, and if you want to be an independent contributor and do this without any direct reports, we'll figure out a way to do it.

The fact that FWAs work for some positions and not others can be hard for employees to accept. One of the most difficult and important downsides is the perceived and sometimes real impact on career advancement.

I think the toughest part is the perception that by formalizing it, there might be a negative impact on somebody's career. We believe that it reduces that because it sets expectations up front. And then the individuals, they're going to meet those expectations as opposed to falling short of what was expected of a full-time employee. But there's still a perception that it could have [a negative career impact].

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.

Downsides specific to particular arrangements.

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 general FWA downsides as well: reduced career advancement opportunities, perceived unfairness by other employees and managers who don’t want their lives to be more difficult.

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 9-8o 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. Gain Commitment for the Program

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 our customers, and we create the profitability.

Address changing business conditions. In some cases, the flexibility programs were developed in response to business pressures to downsize and continue similar productivity with less staff. In other cases, new work arrangements such as the need to be open/available 24 hours a day drove the business need for new working arrangements.

Mergers

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. The idea for the approach grew out of the need to pull the cultures of the two companies together. It also grew from the desire to have a total rewards approach to recruiting and retention.

Workplace redesigns

[The company is undergoing] a whole workplace transformation, revamping and redesigning offices in strategic facilities, and closing ... facilities, so ... if people are in the area of a facility that is being closed, and too far away to go to another one that is open, then they are going to be asked to telework, or relocate.

Requirements of the global economy

And additionally, you know, as the United States was ... clearly becoming more of a global economy and that this is a global organization. And we were beginning to ask employees to be able to support customers who were in very different time zones around the world.

Improve productivity. A few companies introduced new working arrangements as a means to improve productivity. A large majority of the interviewees indicated that the flexible working arrangements they were using did indeed improve their personal productivity. This is an important counter to the idea that work-life balance means doing less work.

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.

Sometimes new programs are initiated as a way to attract a specific type of employees.

It was definitely, it was more in being able to recruit part-time people. At the time, there were a lot of women leaving the workforce to raise their families. It was a way to attract them into a job that would be a benefit for the company but a benefit to them also.

The flexible work arrangements business drivers can be quite clear when the connections are made from satisfied employees to improved business performance.

How do we become an employer of choice?

You know they want to be the employer of choice. Right? So they are looking at how to retain the best talent. They are looking at how to create an environment where people are highly engaged because we know engaged people affect the bottom line, right, in the customer experience. They want to reduce turnover. And they want to increase productivity. So there are all these things that companies are trying to optimize in their environments so that the business drives. What the particular leader did at the beginning when he was working with [named person] is he said, okay, when we did an employer-of-choice survey, the thing that came out loud and clear is people want to be trusted to do their work. What can we do there? What kind of things can we do to improve that for people or at least have people come back to us with a perception that they are being trusted. That's not an easy thing to do. It's not something you can really Band-Aid, because people, people know when you don't trust them.

Recoup investment in employees

The business drivers are that—they are two-fold. One is we've invested in people, and about the time—most of the people leave after they've been with us three or four years and up to six or seven years. We have an investment in them, which we would like to recoup, and I'm sure they would like to recoup. So there's that practical matter. It's a practical matter of demographics in that there are not enough people with this [younger] population after the baby boomers. We can't, as they say, weave them out of gold thread. These people are, you know, hard enough to recruit the first time. Why would we not want to find some way to re-recruit them? So those were the main things, to recoup the investment which they've made and we've made and also the plain demographic facts, which will only become more intense.

Obtain the Needed Support from Other People and Groups

In addition to constructing a compelling business case, our respondents pointed out the importance of building the infrastructure necessary for the flexible work arrangement to succeed. One element of this construction involves gaining support from influential people and groups. Our participants were thoughtful in how they accomplished this, being sure to include program champions, cross-functional teams, and other supporting organizations.

Identify and Recruit Champions. Senior managerial support is required at two levels: (1) identifying individuals or groups at a senior level to act as champions to drive the program forward and to design and implement the initiative actively; and (2) to support the program clearly and publicly through words and actions. As stated by one of the participants, “To ensure successful implementation, top management support is a must. It is crucial that they are part of the vision.”

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 training and education, and found others who could make the implementation a reality.

Establish a Cross-Functional Team to Assist with Design and Implementation. While top managerial support and leadership is important for building support for a flexible work-life program, it is not usually sufficient. It is important to identify a core set of individuals across the organization who can help to develop and drive the program. This will support the strength of the design of the program, and ensure it is applicable and available to a wide range of employees.

When you are designing and implementing the program, make sure that you form a really good cross-functional team that touches all areas of the business.

Come up with a strong core group that can get issues resolved and build the processes and procedures that are needed for a work-from-home program.

Engage the Needed Support within the Organization. No new flexible working program is going to be successful if the staff does not take the initiative to join the program and persevere during the early stages before all of the kinks have been worked out. Many participants described the extra work and extra effort of the early adopters of the programs, and how this tenacity played a direct role in its success. As stated by one of the people we interviewed: "I think one thing is I would give a lot of credit to the people hanging in there and working through and getting to the other side." Another HR manager noted the need to identify staff members who will take part in the program in the early stages, and really stick with it even though it is not a requirement of their jobs, and also when they are going to be perhaps the only one of their peers who is using the program. The choice to buy in to a new initiative can be difficult for some staff, but without that commitment the program will fail.

Finally, implementing a new work arrangement may require the compliance of groups or divisions both within and outside the organization, either because they will be directly affected through changing work arrangements, or their expertise will be required to support some of the logistics of the change. It is important to identify these groups such as IT, customers, peer divisions, and labor unions. These groups must be identified early in the design and development of the program and then included to ensure their buy-in and support.

3. Design the Program

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 drive the design.

Do not take a cookie-cutter approach

Make sure to meet the needs of your culture, and do not take a cookie-cutter approach.

Use “the-way-we-work” lens of the organization

Move away from the programmatic view and look at it with more of a cultural and “the way-we-work” lens. If an organization gets too focused on the programmatic side, the impact on the organization and its employees will not be as great.

Take Various Design Considerations into Account

Although specific flexible work arrangements affect work processes in different ways, there are a key set of conditions that must be taken into account when designing any program: fit with existing programs and reward systems; flexibility in terms of how employees will opt into or out of all or parts of the program; and the training and communication methods used to roll out the program.

New flexible work arrangements do not operate in isolation. One participant explained how the company's new flexible work program brought together three teams that had previously worked separately.

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.

One program we studied started out with oversight through regular bimonthly meetings where senior executives review data from staff surveys and focus groups to determine the continued success of the program. An HR representative from another organization noted how they began with monthly review meetings, moving to bimonthly, then extending to every three months as the program settled in and began to run smoothly. These review meetings are ongoing, but 90-day intervals are a time span they've found to be enough to ensure that "...we didn't let anything go, or fester too long, that may have been a problem."

Determining in advance how often to hold review meetings or to survey those using the flexible options is an open-ended process, so it would be a mistake to think that a new program need only be monitored for a few months. Designing a long-term monitoring process into the program can help to clarify to those involved that the program may not be perfect straightaway, and that it is a long-term process, as described by another HR manager: "And we worked out the kinks that entire year, because, there were definitely kinks in the database, just situations we hadn't anticipated..."

Many organizations use general training courses, internal communications, and websites to ensure continuing communication and education support of the program. Again, the design and target of the program will directly relate to the design and target of the education and training programs, therefore, these must be considered during the design process. This is clear from some of the comments we heard.

Educate the employee and the manager

You know I think everything that we talked about, I really think that it's certainly ongoing education, it's huge. And I think the organizational commitment is huge.

Provide good instructions

I think [the organization] runs it really well with the setup that they give you. You know, everything is there. Everything is really well explained. You get a binder when you join. You get the full program with all the instructions, and who to call, and how to do the forwarding on your phone. And they really seem really well coordinated about it. The people who run that program do really well with it.

Develop a plan for managing the program well

I think one thing has been the way we put a lot of thought into processes and programs around supporting this thing. So IT support, telecom support, IT infrastructure, management models—how do you manage this all? Training, getting involved, and making sure that they train the employees right before they go to "work-from-home." So I think there has been... just managing this program effectively has really made it [successful].

Design the Review System

As the above human resource representative noted, it is important during the design phase to consider how the program is going to be managed and reviewed. "[I]t is continuously sort of honing your practice, your work, your processes, your interactions, so—and the way we apply it here is, you re-contract for that every 90 days. So, you are measuring your results, validating the results." A great benefit of determining how success will be measured during the design stage is that the outcome measures can be directly linked to the business case that drove the flexible work initiative in the first place, in the words of one respondent:

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 achieve those [outcomes]. ...So, it always starts with results. And then allow that creativity to allow employees to navigate their own way to maintain a work-life balance but still achieve those results that [are desired], that's what [we're here] for.

An added benefit of clear, codified outcome measures is that the success of the program is visible to all, and therefore choosing the correct metrics as outcome measures can act not only as a monitoring tool to support development of the program, but also as a motivational tool for the staff involved and employees who may see these results and wish to sign on to the project: "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."

For additional information on review and measurement, see section 5. **Monitor and Improve the Program.**

4. Implement the Program

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. Monitor and Improve the Program

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 top of our people's consciousness. The other thing is that we have to overcome the obstacle in some cases when people still don't believe that the organization is telling the truth when it says we really want people to stay in touch with us and come back to work with us. But we're winning that battle over time.

Find out why employees leave the organization

We found out the reason why [we were losing women] is that we weren't being flexible, and a lot of guys had just the wrong attitude about managing the workforce. So we changed that. We held people accountable, and as the next generation rolls in, we started to look for, based on the research, what people really wanted, and we've adapted to that.

Exemplars of Successful Implementation: 20 Model Programs

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 than 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-

ticularly in response to the aging workforce and the impending loss of experienced workers from the baby boom generation (Leonard, 2000). Nevertheless, some companies are still reluctant to offer part-time work. It is sometimes the case that financial performance pressures or limitations imposed on managers as to how many “heads” they can have in their departments to meet productivity targets might force employers to favor full-time employees over part-time workers (Harrington & Hall, 2007). Also, organizations might still harbor the belief that certain jobs or roles (i.e., management positions) are not conducive to part-time work, though research suggests that this is not necessarily true (Harrington & Hall, 2007).

Concluding Comments. Many workers indicate that they would welcome part-time work (Tilly, 1997; Pew, 2007). And companies are recognizing that despite some of the potential obstacles to allowing part-time work, there is much to gain in terms of enhanced employee morale, productivity and work satisfaction, and reduced turnover and talent loss (EPF, 2003). However, key to the success of part-time work is the availability of quality part-time work (including part-year work), which would offer adequate benefits and access to other flexible work arrangements (i.e., telecommuting) (Harrington & Hall, 2007; Leonard, 2000).

Job-Sharing Overview

Job-sharing involves two or more employees sharing the responsibilities of one full-time job. In this partnership, employees may share all responsibilities of the job or choose to divide tasks. They might also bring to the partnership similar or complementary skill sets. The actual configuration of a successful job-share will vary based on the requirements of the particular job and the skills and needs of the job-share partners (The Hudson Report, 2006).

There are many benefits of job-sharing for both employees and organizations (HR Focus, 2006; Managing Benefits Plan, 2006). From an employee perspective, job-shares allow individuals to maintain greater work-life balance by reducing hours at work to spend more time in child care or elder care or pursuing other personal pursuits (i.e., study, community work, etc). Additionally, job-sharing allows individuals to embrace flexibility at work without jeopardizing continued career advancement and skill development. From an organizational perspective, job-sharing is an effective retention tool. It permits organizations to retain the skills, experience, and expertise of more employees, including working parents and employees beginning the transition into retirement. Also, organizations can benefit from the enhanced performance and customer service that comes from utilizing the combined skills and talents of two employees in one job. Finally, supporting job-sharing options demonstrates an organization’s commitment to engendering the values of an employer of choice—a commitment that can see dividends in terms of employee loyalty, recognition, and productivity.

In terms of utilization, the 2005 National Study of Employers reports that of its sample of 1,092 employers, 46% of organizations allowed job-shares to some employees and 13% allowed job-shares to all or most employees (NSE, 2005, p. 6). These numbers are not particularly high given the earlier stated benefits of job-sharing. There appear to a number of myths associated with job-sharing that might be discouraging some organizations from offering this flexible work option to more employees. One prevalent myth is that job-shares are too expensive for organizations to sustain (The Hudson Report, 2006). Salaries for job-shares are typically split among the job partners. However, there might

be some additional cost if the partners overlap on a particular day. There might also be some extra cost with respect to training and health care benefits. However, the availability of coverage (one partner covering for another) during holidays and other leaves can offset many extra costs.

A second myth suggests that job-shares require greater supervision and coordination (Harrington & Hall, 2007; The Hudson Report, 2006). On the contrary, it appears that because the responsibility to make a job-share work lies primarily with job-share partners, employees make a concerted effort to maintain quality performance without undue supervision. In many respects, job-share partners can reduce the need for outside supervision or management support by providing supervision and quality control for each other (The Hudson Report, 2006). A third myth contends that job-sharing is not suitable for most jobs and that they are perhaps only appropriate for “‘women with children’ in administrative roles” (The Hudson Report, 2006, p. 14). This misperception belies continued discussion in research and in organizations to extend the reach of job-sharing to encompass different occupations and work roles. For instance, it has been suggested that job-sharing should be a greater option in law firms (Compensation & Benefits for Law Offices, 2006), and should even be considered by chief executives as a means to alleviate the intense pressure, isolation, and often unmanageable workloads associated with this leadership position (Simms, 2006).

A number of recommendations have been put forth to help organizations and individuals maximize the benefits of job-sharing (The Hudson Report, 2006). Organizations need policies that outline clear guidelines for the use of job-sharing and demonstrate a strong commitment and partnership with employees using this flexible work arrangement (HR Focus, 2006; Hudson Report, 2006). For employees, former job-share partners have emphasized the importance of presenting a convincing business case for the proposed job-share. It is also important to select a partner carefully with whom you share similar values and complementary career goals or objectives (Meadows & Rankin, 1995). Moreover, an effective job-share requires a high degree of coordination and consistent, detailed communication between partners (Harrington & Hall, 2007; Meadows & Rankin, 1995). A strong job-share team is founded on collaboration and trust and not competition between partners. It can withstand any attempts to play one partner against the other (Meadows & Rankin, 1995, Simms, 2006). With a successful job-share partnership, the union in time becomes almost transparent or invisible to the organization. The separate partners in an effective job-share can often come to be seen as one person.

Teleworking Overview

Basic Concepts and Definitions. Telecommuting, sometimes also called teleworking, is an alternative work option that has been defined as “a schedule in which employees conduct their work off-site for some of their core working hours” (Pruchno, 2000). The off-site work is done away from the traditional office space in locations such as the employee’s home, a satellite office, or a client site. In conjunction with work off-site, telecommuting typically involves the use of telecommunications technology, including computers, fax, copiers, additional telephone lines, and high-speed/broadband and other wireless access capabilities (Kossek, 2003).

There is much variation in the telecommuting arrangements used by employees. They range from part-time to full-time, and can be formal agreements or informal practices. Consequently, some

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,

2004). From the employee's perspective, leaves of absence can be less punitive to wages than career gaps. And, survey research looking at individuals who have used family leaves finds that the majority of these individuals report positive benefits to their own and their family's emotional and physical well-being (Waldfoegel, 2001).

In spite of the many benefits associated with generous leave policies, the use of leaves are still sometimes seen as problematic to employees and employers. From the employee's perspective, research suggests that individuals taking leaves are less likely than non-leave-taking employees to receive salary increases, promotions, and favorable performance evaluations the year that they are away from work (Judiesch & Lyness, 1999). Taking unpaid leaves can also be financially untenable for many employees. For instance, survey research examining the impact of FMLA on leave-taking among employees finds that 77.6% of employees in 2000, who had access to leaves and needed them, reported not taking time away from work because they could not afford to be without an income (Waldfoegel, 2001). Given these findings, it is perhaps not surprising that the average family leave time for employees, since the implementation of FMLA, has been ten days (Harrington & Hall, 2007). From an organizational perspective, although leaves can have long-term benefits with respect to employee retention and work satisfaction, there can be short-term challenges (Rudd, 2004). When an employee takes a leave, work often needs to be reallocated, in some cases by requiring co-workers to pick up extra work. Also, some organizations report added difficulties in terms of the implementation and administration of various leave policies (Waldfoegel, 2001).

However, it is encouraging that the above-indicated challenges associated with leaves have not discouraged many forward-thinking organizations with supportive middle managers from offering generous leaves, including paid leaves (Harrington & Hall, 2007). So, innovative leave policies continue to be found in workplace cultures that support an ethic of care, value work-family balance, see benefit in the retention of a diverse workforce (i.e., women, parents, etc.), and strive for measurable outcomes over face time (Rudd, 2004).

Compressed Workweek Overview

Compressed workweeks involve working 40 hours per week, but in fewer days than found in a typical 9-to-5, five-day workweek. There are many different configurations to the compressed workweek. For instance, an employee can work 40 hours in four days (a 4/40 schedule), or 80 hours in nine days (a 9/80 schedule). The 2005 National Study of Employers found in their sample of 1,092 employers that 39% of organizations allowed compressed workweek schedules to some employees and 10% allowed compressed workweeks to all or most employees (NSE, 2005, p. 6).

As is the case with most flexible work options, there can be some difficulties with associated compressed workweeks (Emory, 2007; HRDC, 2007; Katepoo, 2007). Working extended days (i.e., nine- or ten-hour days) can be ultimately physically and mentally exhausting for employees, particularly if their jobs involve highly repetitive tasks. And, the fatigue from working longer days may not be alleviated by an extra day off from work. Also, trying to schedule child care and/or other family and personal responsibilities on extended workdays can be problematic for some employees. From an organizational perspective, compressed work schedules might pose some challenges in terms of supervision, maintaining operational coverage, and productivity declines if employees are experiencing fatigue or stress.

Despite some of the potential drawbacks, compressed work schedules can offer a number of benefits to both employees and companies (Emory, 2007; HRDC, 2007; Katepoo, 2007). For employees, compressed schedules allow individuals to have more days away from work to devote to leisure or to take care of personal and family responsibilities without jeopardizing pay. Also, employees on extended schedules can often avoid long commute times by avoiding peak traffic periods. From an organizational perspective, compressed workweeks can promote better work-life balance and, in turn, increase employee morale, productivity, loyalty, and work satisfaction. Additionally, employers can provide extended service to customers, and optimize use of equipment and staffing levels while controlling overtime costs.

BOLD Initiative Overview

The BOLD Initiative project is managed by The Bold Initiative, a nonprofit consulting group, funded by the Alfred J. Sloan Foundation. Initial pilot projects were conducted at ten companies: Chubb, Frito-Lay, Gannett Co., Johnson & Johnson, Macy's Northwest, Pitney Bowes, Puget Sound Energy, Prudential Financial, Weyerhaeuser, and Nextel Communications. The following materials that describe the initiative were provided by Bea Fitzpatrick, president and CEO of the BOLD Initiative and taken from the January 2007 issue of *The Network News* provided by the Sloan Work and Family Research Network at Boston College.

The BOLD Initiative's mission is to transform the way corporate America views and utilizes flexible work options: from being an employee perk to an effective tool for enhancing performance. This mission has never been more important. American corporations are consolidating and downsizing, as well as outsourcing and creating facilities overseas, thus increasing stress on employees who are being asked to do more with fewer resources. At the same time, shifting demographics are driving an intense war for talent among corporations who are striving to attract and retain the very best talent.

BOLD's team-based, results-focused approach to workplace flexibility is providing companies with an opportunity to address their competitive pressures at the same time as employees are able to reduce the stress they experience from conflicting demands on their time from work and their commitments and interests outside of work. As a result leading companies in highly diverse industries are embracing this approach and applying it in a wide variety of functions, encompassing both exempt and non-exempt employees.

Once enrolled, and with the support of BOLD consultants, participating companies launch pilot projects with selected teams in areas where there is a compelling business need for increasing flexibility and where they need to tap into employees' experience and commitment to enhance overall business performance. Employee teams develop flexibility plans that include targets for measurable improvements in team performance, flexible work schedules that accommodate the diverse needs of every team member, and innovations in work methods that enable the team

both to meet its performance improvement goals and allow team members to flex around their personal needs. Building on successful pilots, the companies then scale up the use of flexibility in the pilot locations and roll out the approach to other functions.

American Airlines has also been participating in this initiative. The BOLD Initiative at American Airlines is organized around three key factors: productivity and metrics; team-based flexibility; and, continuous improvement (B. Ganslen, American Airlines, personal communication, June 8, 2007). With respect to productivity and metrics, teams are expected to set and meet measurable goals or productivity targets every 90 days. These goals can be numerical (i.e., generating X revenue or meeting X volume targets), or nonnumerical (i.e., developing a particular project or redesigning a process). Meeting agreed-on productivity or stretch goals allows a team to negotiate new targets and continue participation in BOLD.

BOLD's team-based flexibility approach acknowledges individual employee needs for greater work-life balance and control, as well as needs for greater inclusion and recognition in the workplace (B. Ganslen, American Airlines, personal communication, June 8, 2007). Consequently, a team works together to support individual team member's needs for flexibility. With this approach, team members can make use of differing flexible work arrangements such as telework or compressed workweeks with the appropriate technological support (i.e., remote desktop connection; VPN access; Call Pilot; and, NetMeeting). However, the focus always remains on the ability of the group to meet productivity targets. So, it is understood that individual or group flexibility arrangements are subject to change in response to changing or conflicting work needs.

Finally, with respect to continuous improvement, as noted earlier, teams routinely (every 30, 60, or 90 days) renegotiate their BOLD contracts (B. Ganslen, American Airlines, personal communication, June 8, 2007). Participation in BOLD is viewed as a privilege and not as a right. Some critics of team-based approaches that emphasize continual growth worry that such strategies can jeopardize employee well-being by making individuals vulnerable to group or peer pressure to meet productivity targets (Sennett, 1998). Additionally, granting some flexibility and, perhaps, pseudo-independence to work teams might allow top management to exercise power without taking responsibility for outcomes (Sennett, 1998). Nevertheless, supporters of BOLD and similar team-based approaches indicate success in using these programs in terms of enhanced employee morale and organizational productivity (Gannett, 2005).

Results-Only Work Environment (ROWE) Overview

According to CultureRx founders Jody Thompson and Cali Ressler, a Results-Only Work Environment (ROWE) is a radical transformation of working culture away from an increasingly antiquated 9-to-5, 40-hour week modality and a corporate culture that emphasizes "lots of face time, lots of hours, get your butt in your chair" (Jossi, 2007, p. 48). Instead, ROWE embraces the freedom of employees to work when, where, and how they choose as long as the work gets done (CultureRx, 2007; Jossi, 2007). The focus is on results and achieving mutually contracted, clear work goals (outcome-based evaluation), and not on face time or how many hours an employee worked (line-of-sight management). This approach to working requires trust and freeing employees from traditional notions about effective workplace strategies, including common "flexible" work options (which can sometimes

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.

Currently 4,000 of Best Buy’s corporate employees have access to ROWE and it continues to expand. This expansion reflects the success of ROWE at Best Buy in promoting reduced turnover, enhanced productivity, improved employee morale and engagement, and exceptional work. For instance, Best Buy reports a 35% increase in productivity over a six- to nine-month period for those units implementing ROWE (Jossi, 2007). And, in three divisions studied by CultureRx, voluntary turnover had dropped between 52% and 90%.

The provision of various forms of technology in the form of laptop computers, BlackBerry devices, and cell phones to employees has helped to make ROWE a success at Best Buy (Jossi, 2007). However, it remains that the ultimate success of ROWE lies in the ability of an organization to release its traditional views around working and move beyond skepticism to allow a cultural transformation to take place.

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***Prime-Time Schedule*****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 paper-work 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 different jobs. So the intellectual capital that’s built up in your clerks, your senior clerks, your frontline supervisors, and everybody up and down the line -- that’s the big benefit of it. I’ve got folks that I can move around. When I have an opening, my immediate reaction is very seldom to hire from the outside for any kind of opening. It’s all entry level hiring we do from the outside because there’s so many people that are ready to step up into something bigger because they’ve been doing it a while or have the expertise or have been around. So I think that’s a big payoff. You’ve just got to have a little faith. I think the biggest difficulty is going to be either older or frontline supervisors. As I remember that was our biggest struggle.”

-- Clay Williams, Senior Vice President

Employee Comments

“I think it’s been really the best of both worlds with being able to continue my career. I can’t believe I was able to keep my career and continue building on my career and I continue to learn things in my job and get new responsibilities. And at the same time, I still get to be a mommy. I don’t feel guilty about the time away.”

-- Amy Jenkins, HR Development Consultant

Recommendations

Start at the top and share with senior leaders the success of other companies who have benefited from flexible work options, and also talk to your employees. You have to know what they need.

Contact Information

Vicki Dye
Culture and Work/Life Consultant
First Horizon National Corporation
300 Court Avenue, 6th Floor
Memphis, TN 38103
901-523-5532
vldye@firsthorizon.com

Program	<i>Reduced Workload Model</i>
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. <ul style="list-style-type: none"> • 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.

Contact Information Barbara Wankoff
Director, Workplace Solutions
KPMG
Montvale, NJ
201-307-7569
bwankoff@kpmg.com

Program *Part-Time Work*

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 work group.

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 attract and retain highly valued employees who otherwise would have left the company or to support projects where a unique skill set is required. Following is a sampling of the part time work currently being supported:

One manager is an executive coach to the organization; another is a world renowned professor and researcher at a prestigious college in Switzerland and the third is working on a grant from Carnegie Mellon cataloging the research papers of a former Bell Labs Vice President for donation to Princeton University. Another employee has a unique relationship with the customer and it was in the company's best interest to retain him on a part time basis to continue the interface with the specific customer.

Obstacles The biggest obstacle is the way the company treats headcount. They do not use full-time-equivalents (FTE). If a person is working 20 hours they are counted the same as a person who works 40 hours from a staffing perspective.

How Obstacles are Overcome Typically, at the employee's request, a manager assesses the situation and determines if the cost – essentially utilizing a full headcount for a part time position is worth the reward of continuity in staffing the position. The policy is not very flexible from a headcount standpoint.

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,
and Director of IT Communications and Reporting*

Employee Comments

“I think it helps the company enormously. And 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.”

“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 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.

Contact Information

Alcatel-Lucent
600-700 Mountain Avenue
Room 7D409F
Murray Hill, NJ 07974
908-582-5440
kpraskac@alcatel-lucent.com

Program***Part-Time Sales Force*****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 has employee survey data regarding satisfaction with work/life balance. Professional measurement and compensation are based upon performance, goal attainment, 'Winning Practices' and company profit.

Factors in Success

The part-time sales force is entirely driven by business needs. There is a great deal of positive momentum at this point, and the sales force has adjusted well to changing demands over time.

Employee Comments

"The manager that I have come from a tradition of managing full time employees. It was an adjustment period to working with primarily all women who are working mothers and who had to have a work life balance. Over the years, he kind of came around to it and enabled our division to deliver consistently high performance based on our unique strengths."

"I think you have to learn how to organize the job so that it works for you rather than working for it. As working mothers, we are expert time-managers, organizers, multi-taskers and diplomats. Most of us have been in our territories so long that we know all the people that we call on and we [have] built relationships with them. It's a lot easier to conduct business that way, no matter what product we're coming in with."

"I'm divorced so I had to run a household with kids, then off to work, all at the same time. Actually having the job that I did allowed me to stay sane."

"All of us have had successful and profitable careers prior to working part-time for GSK. It is a 'win-win' situation for both GSK and for us. The company has the advantage of our years of experience and business acumen, and in return we are able to hone and grow our skills and have the opportunity to be involved in our children's lives in a very personal way."

"I would like to see this program evolve in a lot of different industries. I think for women, especially working moms, it's just a gift."

-- Janet Middleton, Senior Health Care Specialist

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.

Contact Information

Joyce Hrynewich
Manager, Human Resources
GSK Consumer Healthcare
412-200-3190
joyce.n.hrynewich@gsk.com

Job-Sharing

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

Program	<i>Field Job Sharing</i>
Description	<p>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.</p> <p>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.</p>
Administration	<p>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.</p> <p>The company limits the number of job sharing arrangements to one per district.</p>
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.

Benefits

The primary benefits to TAP's job sharing program are the following:

- Turnover can be reduced. No additional costs are incurred from a recruiting and training perspective and it helps maintain the employee knowledge base.
- It helps TAP recruit new sales representatives.
- The company is recognized for its programs – TAP is on the Companies that Care honor roll list.
- When one person in the job sharing partnership is not available, the other can step in and provide backup.
- It increases company loyalty for those who participate.
- It brings new perspectives to the district and provides opportunities to capitalize on different selling skills.

Measurement

Approximately 6.9% of TAP's sales force is currently involved in a job sharing arrangement. TAP tracks quarterly utilization trends and does an end of the year comparison to the prior year. 9.9% of all TAP employees participate in some type of formal flexible work arrangement.

TAP also conducts an employee survey every other year that asks questions about flexible work arrangements. In 2006 a sample of employees also completed the Companies that Care survey that contained an entire section on flexibility.

Factors in Success

Senior management support in both the field and the corporate office has been important in reaching current utilization levels.

Program utilization has increased gradually, allowing TAP and its people to gradually adjust to this type of work arrangement.

Manager Comments

“The addition of the job share option has been a tremendous addition for our employees. We do emphasize to interested participants that this is not a just a part-time job, but rather a career. For a field-based selling position it is important to note that the participants must have some flexibility to meet the changing needs of the business, but they are also offered much flexibility by sharing the career with another committed individual. To have a career where you can still get so many of the benefits of being in a highly professional position but still be able to have that balance that you're looking for as your personal life circumstance has changed or dictates, is not commonly available. These positions are in high demand, yet they are few and far between in the pharmaceutical industry. At our organization, it's been more of an exception rather than the rule that we can't find someone to fill the position. It has happened. But I would say it's just a tremendous benefit for the employee that they're able to maintain employment at TAP and still accommodate their personal circumstances.”

-- Megan Viviano, National Sales Director

Employee Comments “We both have separate performance reviews, but we decided that it really didn’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.

Contact Information Terese Bell
Manager, Inclusion & Work/Life
TAP Pharmaceutical Products, Inc.
675 North Field Drive
Lake Forest, IL 60045
terese.bell@tap.com

Program***Teleworking and Job Sharing***

Description

HP has a long-standing history of providing employees with flexible work options, beginning in 1973. HP believes that if provided with an environment that is flexible and respectful of the individual, employees will perform at their highest potential. About 70% of HP's U.S. employees "telework" or "flexwork" on a regular or ad hoc basis. HP considers telework as working remotely 100% of the time, while flexwork is varied and not necessarily 100%.

Telework – Allows an employee to work full-time from their residence for business or personal reasons.

Flexwork – Provides employees with flexibility in where and how they work. Employees can perform some of their job responsibilities at their primary HP business location and the balance of their job responsibilities from their home.

Telework/flexwork and virtual teams have become the norm at HP. Tools are made available such as teleconferencing, web-based meeting rooms and the HP Halo Virtual Collaboration System to facilitate virtual team effectiveness.

While these flexible work options are available to all employees, they must be approved by managers in advance -- they are not rights. Managers consider the needs of the team, current project workload, and overall organizational plans and goals when determining work arrangements. As can be expected, these dynamics are continually evolving and, while virtual teams are certainly able to succeed, making time for face-to-face interaction with colleagues remains a crucial component of their success. For some employees or teams, ongoing in-person collaboration may be necessary in order to achieve their specific goals.

HP is also taking steps to better align working spaces to the needs of a mobile workforce. They are in the beginning stages of a four-year global effort to revamp HP sites across the world to make them more productive and collaborative, keeping pace with the way employees are working. Updated offices will feature more free-address space for mobile workers who may not need an assigned office, but will still need access to private conference rooms, "quiet zones" and shared team spaces. HP Sites will also feature Voice Over IP / Wireless LAN for the convenience of all workers.

HP also has job sharing which allows two employees to share the tasks and responsibilities of one full-time position. In this arrangement, each job share partner is on part-time status and the employees share the responsibility for coordinating and accomplishing certain job responsibilities. They can stagger their arrangement to accommodate their needs as long as their manager approves their plan. For example, one person can work three days per week, and the other can work two days a week, or any other arrangement they decide on.

Administration	<p>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.</p> <p>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 approved by their manager. Job share employees are then entered into the system as part-time workers.</p>
Drivers – Why Developed	<p>The company saw an opportunity to meet employees' changing lifestyle needs and created various flexible work arrangements to help employees meet their needs while ensuring business objectives were still being met.</p>
Implementation Approach	<p>Implementation of the various flexible work arrangements was conducted over the years using standard company communication vehicles.</p>
Obstacles	<p>The Teleworker arrangement can be employee or company initiated and can be terminated if it is determined that business needs or performance expectations are not being met. In order to avoid conflict, it's important that managers and employees understand how to be successful at teleworking and how to successfully manage a teleworker.</p>
How Obstacles were Overcome	<p>In order to help managers and employees become successful in a virtual work environment, HP partnered with work-life vendor, Ceridian. As a result, both manager and employee teleworker training courses were developed and are being delivered globally.</p>
Benefits	<p>The main benefits of the teleworking and job sharing programs are as follows.</p> <ul style="list-style-type: none"> • These benefits are needed in order to help HP attract and retain good people – they make HP more competitive. • Employees are happier and more productive. They are better able to balance their work and personal lives.
Measurement	<p>HP tracks the number of telecommuters using the HR data base. There is also a yearly employee survey that has questions pertaining to work/life programs.</p>
Factors in Success	<p>HP's Flexible Work Arrangement Programs support employees in optimizing their contributions and productivity to the company, resulting in more balance between their professional and personal lives. In addition, when employees initiate their requests, they tend to work hard to make the arrangements successful.</p>

**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 Bordonni, 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.

Contact Information

Mary Ellen Parker
Diversity and Inclusion
Hewlett-Packard Company
2 Results Way
Mailcode: MRO2-4/C15
Marlboro, Massachusetts 01752
508-467-3767
maryellen.parker@hp.com

Teleworking

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

Program***Teleworking*****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.
-

Contact Information

Natalie Jackson
Work/Life Program Specialist
Booz Allen Hamilton
8283 Greensboro Drive
Suite B4040
McLean, VA 22102
703-377-0367
jackson_natalie@bah.com

Program***Teleworking*****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 often they want to have one-on-ones, and so forth.

Administration

The Work-Life Consultant provides general oversight for the program. Hands-on administration is provided by a designated resource in the IT department with assistance by an administrative resource from the work-life department. Program training is provided by an outside resource under the direction of Lilly's work-life consultant.

**Drivers –
Why Developed**

An internal work-life needs study of Lilly's US workforce conducted in the 1990s highlighted how really non-traditional the workforce was becoming. The CEO at the time, Randy Tobias, 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 Lilly employees were mostly traditional, the results of the study revealed that the company in fact had a very diverse population with all kinds of family situations and needs. Research into flexible work arrangements established these clear business benefits: productivity, retention and work/life balance.

**Implementation
Approach**

There was an initial pilot program conducted with local employees from the Indianapolis corporate center. The pilot results were positive, and recommendations were taken to the Senior HR Council. The proposal was accepted and the program was rolled out as another offering in the suite of flexibility options that already included flex time, part time, job share, and leaves of absence. One additional flexible work arrangement introduced after teleworking was Lilly's compressed work week alternative.

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 working fulltime from home.
-

How Obstacles were Overcome

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. Presentations were made to IT management who understood the challenges and agreed to dedicate a resource.

The “line-of-sight” management issue was harder to address, and is still present to some extent. Resulting from a separate initiative, the performance management process had already been revamped to make it much more outcome-based and less activity-based. Training for managers of teleworking employees also helped. The workforce has become increasingly dispersed --with teleworking becoming a valuable tool for retaining employees who must move away from a corporate office. This reality has helped demonstrate the value of the program and has helped overcome resistance as well.

Benefits

The main benefits are:

- retention / increase in employee loyalty
 - productivity gains
 - company branding and reputation (Fortune & Working Mother lists)
 - recruitment
 - improved work/life balance for employees
-

Measurement

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

Factors in Success

The key factors in success of the teleworking program were:

- early championing of flexibility by the CEO
 - perseverance by the Director of Work/Life
 - getting IT on board
 - training
-

Manager Comments “We don’t really recommend it for people new to Lilly or new to the team, because it’s really something that you – I feel that one really needs to establish relationship with customers and their peers and other folks on the team before they’re able to telecommute.”

“I think they’re able to get more work done. I think they’re able to stay focused, because, they sometimes don’t have all the distractions that occur when you’re sitting in the office.”

– *Team Leader for Neuroscience Global Medical Communications*

Employee Comments “And my boss, at the time, she called me over and she said, ‘So, Melissa, we can tell you really love the job. We really enjoy your work. She said, ‘Lilly has this official teleworking program. And we’d like to consider hiring you on as a full-time employee and let you join the teleworker program.’ ‘Here’s the number of the person to call within the company to learn about the program.’ And she said she would support me in doing that. And I gave her a big, giant hug.”

“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.”

– *Publications Coordinator for Cymbalta*

- Recommendations**
1. Do a pilot; have data to demonstrate the business case.
 2. Get IT on board early to provide effective support.
 3. Set up your performance management system to focus on outcomes, not activities and face time.
 4. Provide good program documentation that is readily accessible. Use this documentation to emphasize that teleworking is not right for everyone—ie, not all jobs can be done remotely and not all employees are suited to work remotely.
 5. 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.
-

Contact Information Nancy McMillan
Associate Work/Life Consultant
Eli Lilly and Company
Lilly Corporate Center
Indianapolis, IN 46285
317-276-9455
nmcmillan@lilly.com

Program***Virtual Call Centers*****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 locations and still maintain their job with Dell. Training is done online or either at the military base or at one of the Dell sites.

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.
- Community relationships have been built.
- Dell has been able to attract qualified workers.
- Employees save money on gasoline and food.
- Managers can spend more time working on projects and less time walking up and down the aisles to make sure people are working. Floor spats no longer occur. Employee performance ratings are more objective.
- It has changed the company culture in that it has helped employees and managers think differently about how to get work done.

Measurement

Dell tracks the number of people who are participating in the program. Utilization is substantially higher in two of the call center sites than the others. Performance metrics of the virtual call center workers are tracked and compared to the regular call center workers. There are also employee and manager surveys done on a regular basis.

Factors in Success

There was a great deal of thought put into the processes and policies supporting this program: IT support, Telecom support, IT infrastructure, management models, training. That has had a major impact on the program's success.

Management buy-in has been essential to the program's success. As additional organizations have gotten started there has been much success and little resistance.

Manager Comments

"I am still very much a huge advocate of work from home and I think every company should offer it."

"I think they are able to do a lot more, because they don't have the noise around them. They don't have people poking at them saying 'Hey I got a question, can you answer it for me?'. Which is a positive, but it can also be negative because they can't turn around and say 'Hey I got a question, I don't know how to fix this.' So they have to wait for somebody to respond to their instant message that they sent out or something like that. Usually it's a quick response, but initially when they first go out, it's a little bit difficult for them because it's just so quiet. And it's always really loud here, in the call center, because they are always talking."

"I have the ability to be here all the time right in front of them. I can share my time more effectively. I can see what's going on. Not running around the building and then even when I'm in meetings, I bring my team with me because they're on my notebook."

"These guys are happy, and you don't find a lot of that in the call center business and they are ecstatic about it and that's the biggest benefit ... they don't want to do anything else."

-- Sue Vinson, Technical Manager

Employee Comments

"With the kind of environment we work in, it's very easy to track that sort of thing because everything is measured and put in spreadsheets. My statistics went up within a couple of weeks, everything started to get better. That was the general rule for everybody that did the work from home. Everybody's numbers started to get better within a couple of weeks. Yeah it was very successful. They were quite surprised by the results, actually."

"I think the biggest thing that is going to help the company is that people aren't going to quit the job. It's going to help with retention a lot."

"It's not good for everybody. There are a lot of issues with staying focused from home and not playing computer games all the time and disregarding the customers, things like that. But for most mature people, it would be a really good program. ...the big thing with working from home is you have to be independent; you have to be able to solve your own issues without a lot of babysitting."

-- Chris Knol, Technical Support Representative

Recommendations

Make sure that you have buy-in from all of the needed support groups (HR, legal, IT, Telecom), before you go down this path. Come up with a strong core group that can get issues resolved and build the processes and procedures that are needed for a *Work From Home* program.

Contact Information

Rolando Balli
Global Diversity
Dell Inc.
One Dell Way, RR1 MS8001
Round Rock, TX 78682
512-723-1375
rolando_balli@dell.com

On and Off-Ramp Programs

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

Program***Personal Pursuits 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.

Contact Information

Stan Smith
National Director, Next Generation Initiatives
Deloitte & Touche LLP
Ten Westport Road
P.O. Box 820
Wilton, CT 06897-0820
704-227-7850
wstantonsmith@deloitte.com

Program***New Parent Reintegration***

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 saying here are 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.

Contact Information

Dana Vandecoevering
Work/Life Program Manager
Intel Corporation
2111 NE 25th Avenue
JF3-234
Hillsboro, OR 97124
503-712-7827
dana.vandecoevering@intel.com

Program***Phased Retirement***

Description

In the early 1980s MITRE introduced a phased retirement program that allows employees age 59 1/2 and older to reduce their hours and begin to collect retirement benefits. Employees move to a regular part-time schedule - at least 20 and less than 40 hours/week. They can collect retirement benefits from all of the voluntary portions of MITRE's retirement program but not the qualified portions of the program. If they are scheduled to work a minimum of 30 hours, then they still get the full subsidy on their health insurance plan, but if it's less than 30, then they have to pay a greater percentage of the costs.

Administration

Employees complete a form to apply for the program. The application is routed through HR, and up to the senior management for approval. If approved, then a Human Resource Transaction is done to update the employee database appropriately. Employees work with the HR service center to help them apply for annuity payments.

**Drivers –
Why Developed**

Peoples' best recollections (this was more than 20 years ago) are that some employees asked the benefits people if such a program could be implemented. In response, the company discovered that MITRE's retirement contribution plan offered a lot of flexibility in terms of being able to offer such a program. The program was relatively easy to put in place and did not cost the company any money. Since then, having the plan in place has become a real asset for the company.

Obstacles

Other than the effort to research the retirement plans and legal regulations, there were not any significant obstacles. The company simply needed to perform its due diligence.

Benefits

The largest benefit is being able to retain capable staff members for a longer period of time. MITRE provides options to the employee, and in turn, the employees feel good about the company – their loyalty is increased. Working with employees in a life cycle type of approach, depending upon where they are in their careers, has been very beneficial to the company. They see it as a win/win. The company gets loyal employees and retains their knowledge, their skills and the relationships they have with important clients. The employees get more flexibility and reduced time at work. They get to ease into retirement and it gives them a period of time to make some decisions and some adjustments. And financially, employees are protected because they have retirement annuities to bridge the gap between their part time salaries and their prior full time salaries.

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.

Contact Information

Bill Albright
Director, Quality of Work Life & Benefits
MITRE Corporation
7515 Colshire Drive
McLean, VA 22102-7508
703-883-6538
albright@MITRE.org

Alternative Work Schedules

- Raytheon: 9/80 Work Schedule

COMPANY RAYTHEON

Program *9/8o Work Schedule*

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 9/8o 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.
- There were a lot of worries about car pools, child care and other personal scheduling issues.
- Concerns were raised about not being available to customers and other company business units on the regular Friday off.
- There were some concerns over the length of the 9 hour working days.

How Obstacles were Overcome Obstacles were overcome in the following manner.

- Managers permitted the needed adjustments. Some employees were allowed to stay on a 40 hr./week schedule. At least one employee worked half-days on all Fridays. Some employees delayed going on to the new schedule.
- Customers and other organizations were provided emergency contact information and informed about the schedule.

Benefits

There have been many benefits to having the program.

- It increases employee satisfaction. Employees love having the Fridays off. It gives them one extra day to get things done and reduces the pressure.
- It has been a big selling tool for recruiting.
- It helps retain good employees.
- It reduces the need for other flexibility arrangements that may cause scheduling difficulties for the manager.
- It reduces absenteeism.
- It increases productivity.
- It provides an extra non-weekend work day when it's needed to meet a deadline
- Reduces traffic congestion on Fridays

Measurement

Approximately 8,000 out of 11,000 employees in Missile Systems are on this plan.

Factors in Success

The main success factors were:

- rolling it out across the whole organization at once, and
- making it the expected way of working, but allowing employees the flexibility to vary from it if they needed to.

Manager Comments

“Productivity has increased. There’s a different mind-set: i.e. people are more willing to come in on the Friday off if they needed to do overtime, as opposed to the reluctance to come in on a Saturday or Sunday. [They are] willing to come in on a Friday regardless of whether they will or will not get paid.”

– Trindy LeForge, Senior Principle Software Engineer

Employee Comments

“Give people the flexibility they need and I think the key thing is just hold people accountable - be clear of what you expect from them and what you want from them, and when the deadline is, and get an agreement and hold them accountable. And as long as you hold people accountable and everyone’s clear on what the goal is, then flexibility is just what people need. It’s the way the world is changing.”

– Teresa Schmitz, Project Manager in the Information Technology Department

Recommendations

- To ensure successful implementation, top management support is a must. It is crucial that they are part of the vision.
 - When you are designing and implementing the program, make sure that you form a really good cross functional team that touches all areas of the business.
 - Roll it out to the whole work force at once.
 - Be aware of the labor laws in your state so your policy is aligned with them
 - Engage your labor union in the development of your program early on to get buy-in if you want them to be included.
-

Contact Information Anne Palmer
Raytheon Company
P.O. Box 11337
Bldg Mo5 M/S 3
Tucson, AZ 85734
520-794-2190
aepalmer@raytheon.com

Linked Business Results and Flexibility

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

Program***BOLD Initiative*****Description**

The BOLD Initiative strives to improve productivity and teamwork while providing flexible work arrangements as a catalyst for the improvements. The concept comes from the not-for-profit group called the BOLD Initiative, who is studying workplace flexibility via support from a grant from the Sloan Foundation.

Workgroup teams create a charter for both the flexibility they want as individuals and as a group (how they will support each other), and also define metrics and improvement goals that they plan to achieve. To achieve the goals, they need to work together to improve their processes.

Employees use flexibility as a catalyst to plan their work differently and become more effective both as individuals and as a team.

Administration

- The program administrators (Cheryl and Beth) provide the tools to get it started and the teams, with the support of their managers, are responsible for making it happen.
- Every 90 days the teams and their managers review the results and either re-contract by setting new goals for the next quarter or determine that they will not continue in the program.
- The administrators hold quarterly meetings with representatives from all teams to enhance accountability for results and create a platform for sharing best practices.

**Drivers –
Why Developed**

The mindset of employees is different now than it was in the past. In order to attract and retain new employees AA recognized that they needed to function in a different way. The company has had a massive continuous improvement effort since 9/11. Tied in with that has been an effort to build cooperative teams. This new program supports all of these efforts. At the same time there are things that are very difficult to change because they are so deeply entrenched in an eighty-year-old culture. For example, there has been a very strict policy around attendance. AA employees can't say to you-- "Sorry, you can't go on your flight because we aren't working today."

**Implementation
Approach**

The program was piloted in the Fall of 2006 using help and support from areas where the program administrators had built key relationships. It was expanded in a grassroots, "not dictated," purely volunteer way. Even in groups where there was success, some of the counterpart groups were skeptical and may not have been ready for this. The approach requires confident managers who can let go.

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 Obstacles

American Airlines has done the following to overcome the obstacles that occurred:

- conducted lots of open dialog sessions;
- encouraged groups to talk with others that have tried the approach;
- avoided pushing it if a group wasn't ready to try it; and
- included a member of the policy team as part of the effort.

Benefits

Some of the benefits of the Bold Initiative are the following.

- Productivity has increased.
- Cost savings have been realized.
- Retention has improved
- Work groups better understand each other better; teamwork is better.
- People are more connected to each other, are more able to focus on the right things, and have better solutions than they had before; they choose accountability.
- Employees are engaged in their work and really motivated to make improvements.
- People feel respected, that their ideas count.
- Family relationships have improved, mental health is better; employees are more satisfied; their ability to concentrate on their work is higher.
- Managers trust their employees more.

Measurement

Some of the ways that progress is monitored include the following:

- tracking program utilization - number of teams and number of people participating;
- tracking performance metrics that each team maintains;
- having debrief sessions at 30, 60 and 90 days within the 1st quarter of implementation to see how the teams are progressing; and
- having quarterly meetings with representatives of each team to track progress and share best practices.

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.
-

Contact Information

Beth Ganslen
Consulting Manager
American Airlines
Leadership Planning and Performance
817-963-1060
Beth.Ganslen@aa.com
Cheryl Harris
817-967-1426
Cheryl.Harris@aa.com

Program**Results-Only Work EnvironmentSM**

Description

A Results-Only Work Environment (ROWESM) 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 style of an entire workplace, leveling the playing field and giving people complete autonomy – as long as the work gets done."

"With a ROWE:

- There is no need for schedules
- Nobody focuses on 'how many hours did you work?'
- Nobody feels overworked, stressed out or guilty
- Work is not a place you go, it's something you do
- People at all levels stop wasting the company's time and money
- Teamwork, morale, and engagement soar
- There's no judgment on how people spend their time

ROWE is all about results. No results, no job. It's that simple."

A Results-Only Work Environment differs considerably from one with a number of defined flexible work arrangements.

- Employees do not need management approval to participate. The option is built into the culture.
- There are no individual policies or guidelines for different flexibility arrangements. Flexibility options are unlimited. The employee establishes and manages his/her own workplace and work schedule to get the work done.
- It requires accountability and clear goals. The focus is on "the work".
- ROWE is an adaptive solution to the overwork challenge.

Administration

The ROWE facilitators go through a migration path with working teams/divisions that consists of three phases.

Phase one is focused on educating the leadership of the team, usually anyone director level or above. They learn about the philosophy of a Results-Only Work Environment and what the business benefits are. Leadership tends to be fairly anxious and nervous about what is happening, although they know that in the end they will experience very positive business benefits. In this phase the facilitators do a pre-audit of the team/division culture to get baseline data on perceptions of the work environment at the beginning of this transition.

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 “SLUDGESM”. 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 elements of ROWE fall into place more easily. Another session is dedicated to how people operate on a day-to-day basis in a Results-Only Work Environment, using tools that already exist such as Outlook or Lotus Notes. Teams also discover habits and behaviors that need to be modified in order to be effective in this type of environment.

When the team is on the verge of going live with ROWE, the facilitators do some sessions with management to be sure they are in a position to go live, and not feel the need to institute guidelines on top of a Results-Only Work Environment. Managers often get nervous again at this point.

In **phase three** the facilitators work with the teams to continue to grow the new environment. There are forums with individual contributors and managers to give them some on-the-spot coaching around different issues they might be experiencing. The facilitators recognize successes that are occurring. They also conduct a check-in survey and a post-audit to find out what attributes of the work environment are changing. This audit is the primary measure of how the culture is changing. After the audit one of the facilitators checks in with the teams periodically to identify their challenges and keep prodding them along.

Implementation

From the beginning, the company realized that the change was not something that you could push onto the organization. The change is pervasive. Managers and employees need to change how they operate. This philosophy of work gives control to employees. Managers have to rethink how they manage. So instead of pushing this on the organization, the facilitators used a “pull” approach. They talked with leaders who wanted ROWE for their area or division, and then waited for the leaders to pull them in. The facilitators did some of the initial phase one activities; if the leaders felt comfortable the migration moved ahead. The facilitators avoided taking on any teams where the leaders were skeptical, because they believed the leaders would inhibit the needed changes. They focused on teams and leaders who wanted ROWE enough to do the necessary hard work.

Drivers – Why Developed

At the end of 2001 there was an Employer-of-Choice group at Best Buy that had done some research and found that the employees at corporate headquarters were looking for more trust; these employees asked to be trusted to do their work and to make choices about living their lives. They were feeling constrained by the traditional work environment. One group of about three hundred twenty people entered into a flexible work arrangement pilot. They had four choices: they could either choose to take reduced hours, telecommute, compress their work week, or use flextime. They all chose one option and all were approved.

After about six months when the pilot was completed, the company found increased employee engagement and trust, along with higher morale. At that point Best Buy needed to decide whether to move ahead with the same program as the pilot, not do anything, or proceed with something different that might increase trust, morale and employee engagement still further.

Best Buy's research showed that other companies initially had positive experiences with flexible work arrangement-type programs, but over three to five years, people were not really taking full advantage of them. The researchers found that much of the lack of utilization had to do with the stigma associated with the choice to work non-traditional schedules.

One of the important leaders at the time was frustrated that the benchmarking and research were taking so long, and finally put a stop to it and told people to get started with something - organic, grassroots, whatever. So the task force was disbanded and the company decided to do something that would be completely differentiated in the marketplace, something that other companies were not doing. In 2003 the Results-Only Work Environment was born.

Obstacles

There have been many significant obstacles to implementing ROWE at Best Buy. 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 results-only. 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.

The industrial model of working was created in the industrial age to support assembly lines and skilled labor working during certain hours. Work was limited to forty hours per week so people would not be overworked. The rules that governed work were developed before the technology age, and we are still operating with that foundation that was put together when times were much different. Work and how it gets done have changed dramatically, but the culture of the work place has not kept up with the changes.

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.
- The "pull" approach has been very effective in moving the program forward.

Manager Comments

"There [are] activities or times within your role [or] your responsibility where it's more conducive to be here. I think what we find more often than not, is individuals recognize that and they choose to be here, and they see the need for themselves to be here. So, I don't think it's as much entitlement as [just] a

recognition that, hey, during this time of the year, [like it's a] holiday, or for this particular role [it] may not be as conducive. Or it may mean different things for different individuals in those roles.”

“[If] I’m not physically there [at the meeting], I need to make sure that everybody is clear, everybody understands the issue, everybody knows what I’m looking for. And, you know, boom, boom, boom. Let’s get [to decision] point and then we can all get on our merry way - - and get those outcomes knocked out.”

[Does your supervisor encourage you to have the employees you supervise use this program?] “Absolutely. Tremendous encouragement up and down. And I think a lot of the encouragement that I personally received and have seen through my supervisor’s peers has been encouraging that self-discovery ... especially early on: ‘Try working from home’ or, ‘Try this.’”

“I felt a little bit of angst when I went in early [as a participating leader in ROWE]. But I also embraced it and said, ‘Okay. I’m going to see what this means to me.’ It helped me think about it differently.”

“My message to another organization is, you’re probably not going to notice an impact at all but the associates are going to notice a huge impact. It’s going to mean something to them more so than it will mean something to the business. The business will derive, of course, the productivity and the impact. And the people [may get] more crisp in meetings and drive the ball forward much more rapidly. But the impact on associate engagement - that’s where the real magic happens.”

“So, start small. Get a [core set of] evangelists. And learn from that. And [then] begin to role it out. I think if you try [the] big bang approach, there’s going to be more questions than [answers], and it probably won’t be as effective as learning as you go.”

– Tyler Rebman, Senior Manager, Enterprise Research and Analytics Group

Employee Comments

“Basically Best Buy has given its employees the ability to work wherever, whenever they would like. It takes an incredible amount of responsibility because you have an incredible amount of freedom, but basically I get tasks or I have websites that I need to make and I know when they’re due and up until that point it’s up to me to just make sure it happens. So, I don’t have to be here necessarily during the day. I don’t - - I can work from coffee shops. I can work from home. I can work from here but they’re really - - they’re just empowering employees to take control of their lives.”

“In the summer I travel around with a group of people and we see a lot of music and we do a lot of camping so I mean I will tailor my work load to the best that I can. For instance in the summers where I will get all of my work up front and I will just work like the dickens, like 10-hours days until I get it all done, and then I’ll take off for a week.”

“Morale is a big part of it because when I’m happy I’m happy to do my work. As far as productivity I can tell you we set a record in November for the amount of learning activities we posted to our learning management systems. So we put 43 websites out there in November and that was under ROWE. That number has - - we’ve never come close to that number before. I can tell you when we were doing that we were working - - I would work maybe a couple of hours in the morning, and then I’d jog around the lake, and then I’d come home check some e-mails. Maybe I’ve got to come in for a meeting, maybe I don’t. A lot of the times I was working in front of the TV during like a hockey game or a Twins game. We were working all sorts of hours during that [period] when we set a record.”

“I would say somehow I’ve become sort of like an Ambassador for the program here so I feel such responsibility that I need to not fail and need to make this program work.”

“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.”

– Mark Wells, E-Learning Specialist, Training Department

Recommendations

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. Embrace the fact that you are different, but look for ways that you can adopt this philosophy to make your company better. Start by playing with pieces of this to help people get over their fear. Do not orchestrate who can use a particular benefit and who cannot. Include everybody. They all want to do good work. Work to change the negative language that is used around the company to diminish those using various flexible work arrangements.

Start with the foundation that you can trust people to do good work, and you can unleash them to operate in a results-only environment. Let them do whatever they want whenever they want as long as the work gets done. Operate under the notion and if they can’t get the work done, then they don’t have a job with you.

Contact Information

Cali Ressler and Jody Thompson
Principals, CultureRx, LLC
Results-Only Work Environment
612-291-6382
Cali.Ressler@bestbuy.com

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

Program***Work Paths***

Description

In September, 2004 Takeda introduced a program called Work Paths to its corporate employees. It includes an “off site path” (telecommuting), job sharing, part time and a “temporary path” which can be a short-term version (6 weeks to 6 months) of any of the other choices. Takeda has always offered flexible hours where employees can set their own hours within core time periods, and did not need to include this program in the rollout of Work Paths.

Administration

There are established guidelines for the program. Employees complete proposals that essentially make the business case for their requests. Proposals contain the following information:

- how the requested flexible work option will fit in with their current jobs,
- how they work best and most productively,
- what their days are like,
- how their business partners will be effected.

Each proposal is given to the appropriate manager, setting in motion a collaborative process between individual employees and their managers. They think through whether the proposal is appropriate and whether it will work for them. They discuss the impact on their business partners and whether it will create hardships for others. After revisions and agreements are made, the proposal goes through a management approval cycle. HR is available to facilitate the process as needed.

Implementation

A sub-committee of the diversity advisory board defined the work-life policies and practices for the company: what the initiatives would be, how flexibility would be treated, what the key business issues were, and what should be offered. The sub-committee was very involved in creating a program and making recommendations to the executive team.

There were sessions with the Takeda executive team to help them understand the various programs and options. These sessions had interactive exercises around work-life issues and how they should be managed. The executives debated each other about work-life choices. There were corporate story tellers to frame some of the discussions. They looked at a continuum of potential work-life philosophies and plotted the company’s position. The culminating exercise was to look at all of the potential work life programs, initiatives, and events that could be done and have the executive team connect these tactics to the philosophy and vision that they had articulated for the business. These steps were extremely helpful in moving things forward.

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,
- employee retention.

Measurement

The utilization rate of the program is approximately 12%.

Managers and participants have been surveyed to see how well the program has been working. Managers feel it is a benefit to them in terms of employee satisfaction and retention. There is also an employee engagement survey that the company does that they try to correlate with their work-life program.

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 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. So, you know, if somebody needs to go pick a kid up from school, or run to the doctor, or stay home for the carpet cleaning guy, you know, it has never been a problem for us to just let people do what they need to do."

"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 Work Path. So, it is really very positive. I mean, it demonstrates a commitment from Takeda that we are not just talking about having a work/life balance, but that we offer a program to make it work."

"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."

"I think the individuals -- the individuals that I know, who are working from home, are definitely as productive or more. Now, those people are developers, who benefit from not being interrupted, who can sit down and just code away and test, it is real easy for them to really crank through stuff. I think, for other people, it's a little more difficult. It is not impossible, but I think in general people that are on my staff are -- they are as productive at home, if not sometimes more."

– Neal Bloomfield, Senior Manager of Commercial Systems, IT

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.

Contact Information Laura Bokhof
Sr. Manager, Work/Life
Takeda Pharmaceuticals
One Takeda Parkway
Deerfield, IL 60015
224-554-6047
lbokhof@tpna.com

Program***Alternative Work Arrangements Proposal Kit*****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.

**Implementation
Approach**

Alternative work arrangements were rolled out within the United States, primarily at business offices. Manufacturing facilities were done later because they posed a different set of challenges.

Obstacles

Some of the obstacles encountered were:

- the need for more resources to communicate the program and train managers and employees
- line-of-sight management

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 arrangements are available.
-

Factors in Success

Success factors include the following.

- A CFO who later became the CEO was an important champion for alternative work arrangements.
 - Making alternative work arrangements part of the job posting system had a significant impact.
 - High level managers participate in alternative work arrangements and are role models for the programs.
-

Manager Comments

“I would advise them to make sure that they get their entire team together, the ones that want to telecommute and not telecommute. I think it’s something that the entire team should sit down and talk about. I think it’s important to include people that are not in the program so that they can put their feedback in and make sure that we’re supporting the non-telecommuters, that their view points are considered, and if there are any issues or things - - just make sure they have their trust factor too. I want everybody on board. I certainly don’t want to separate the group as ‘telecommuters’ and ‘non-telecommuters’.”

“If something happens my entire group is very flexible to be able to work at home in a drop of a hat.”

– *Christine Mead, Manager of Export Logistics*

Employee Comments What recommendations would you have for another company that is thinking about implementing a teleworking program?

"I would tell them that it is a great opportunity. I believe that it would increase the morale of people. I mean it depends on the type of services that that different company would provide. Not everybody can do it. And I would also tell them that it is a great program, but the people who are doing it should be disciplined, and that [they need] to continue working at home as if they were in the office."

– *Brian Kaspari, Export Operations Analyst*

Recommendations Know your work force. Know your organization culture and what it can tolerate so that you're not overselling various types of AWAs.

Take 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.

Contact Information Donna Namath
Senior Manager, Community
Baxter Healthcare Corporation
One Baxter Parkway
Deerfield, IL 60015
847-948-3321
namathd@baxter.com

Program	<i>FWA Database</i>
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. <ul style="list-style-type: none"> • 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 common policy was created in 1999, but there were still inconsistencies and a lack of accountability. A work-life assessment by WFD (a consulting firm in Boston) recommended that PwC establish a single procedure, and the database was launched in 2003.
Implementation Approach	The FWA database was launched without a pilot test. Telecommuters were already centralized and were added to the database first. HR people were trained and counted on to help people through. A series of conference calls for participant training were done, and then all 600-700 people who were interested in using flexible work arrangements had to go through the proposal and approval process using the new database.
Obstacles	Some of the obstacles encountered include the following. <ul style="list-style-type: none"> • There were some technical difficulties with the database • There was an initial learning curve for both participants and their HR approvers. • There were people who were working more than expected.
How Obstacles were Overcome	Obstacles were overcome mainly by persistence and just working through the issues. FWA is such a part of how PwC works. It is expected that employees will be able to work flexibly.
Benefits	Some of the benefits of the program as a whole include: <ul style="list-style-type: none"> • retention of key talent and key knowledge; • recruitment is enhanced by the perception of work/life friendliness; • lower turnover positively affects the bottom line.

Measurement	Utilization is measured through the database. PwC also has done an FWA survey, FWA forums and does regular employee pulse surveys.
Factors in Success	The number one factor in success has been leadership support. It starts with the Senior partner and US Chairman. The top leaders talk about work/life quality and how important it is for the business. They discuss it at their partner business meetings and often kick off flex forums.
Manager Comments	<p>“The benefits of FWA definitely outweigh the disadvantages. We keep people we would otherwise lose; people are happier; people think it’s a good option to have.”</p> <p style="text-align: right;">– Emily Dobry, IFS HR Manager for Chicago</p>
Employee Comments	<p>“I have a great schedule. I work 4 9-10 hour days per week, two at work and two at home. Sometimes I change the days and work at night. There’s a lot of flexibility.”</p> <p style="text-align: right;">– Emily Dobry, IFS HR Manager for Chicago</p>
Recommendations	<ul style="list-style-type: none"> • Develop a solid and consistent FWA program. • Foster an environment of flexibility – informal and formal go hand-in-hand. • Make the right connections for senior leaders to show that this is important for the business.
Some Other Programs of Interest	<p><i>Full circle:</i> Staff members may leave the workforce for up to 5 years to parent full-time. Participants are provided a coach to stay connected to the firm; PwC pays for training & certification to keep them up-to-date; participants are invited to networking events and offered a good faith guarantee of a comparable role when they return.</p> <p><i>Sabbatical program:</i> 3-6 month sabbaticals geared to community service (company provides 40% of pay), or personal growth (company provides 20% of pay); rolled out in July of this year.</p>
Contact Information	<p>Jennifer Duris Office of Diversity PricewaterhouseCoopers 1 North Wacker Chicago, IL 60606 312-298-4025 jennifer.n.duris@us.pwc.com</p>

Program***IBM Flexible Work Options - New Communications Strategy***

Description

IBM is committed to creating a supportive, flexible work environment that gives employees more flexibility and control over their work as an important means to achieve greater work/life balance and enhanced productivity. As part of our Work/Life strategy IBM has created six separate Flexible Work Options.

Compressed/Flexible Work Week: relates to employees who compress their work week into fewer than 5 days. For example, an option would be to work 10 hours a day for 4 days a week.

Individualized Work Schedule: describes employees who vary their work time up to 2 hours before or 2 hours after the normal location start and stop times. This option goes beyond just start and stop times. For example, an employee who works from home 1 day a week may also fall in this category.

Mobile/Telecommuter: are employees who have no dedicated work space at the IBM location because their jobs require them to be away from the office. They could be at customer locations or are frequent travelers.

Leave of Absence Programs are for employees who go on unpaid leave for an extended period of time.

Part-Time Reduced Work Schedules are available for those who have reduced work schedules, that is a less than full-time schedule on a regular, ongoing basis.

IBM's most recently announced option is *Job Share*, a part of the Part-Time option. Job sharing is a flexible work option that provides employees with an opportunity to work a reduced work schedule, and provides managers with an additional flexible staffing option that leverages the talents of two employees to meet the needs of the business

Work-at-Home employees perform their regular work schedule from home without a dedicated IBM work space.

IBM has implemented POWR - People Orientation Work Redesign. This is an on-line tool that provides a very simple way for teams and work groups to determine how they can eliminate unnecessary and low value work. There are more than 100 teams who have used this tool to advantage.

Administration

Flexible Work Options are initiated by employees, but approved by management. The underlying principle is the needs of the business.

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 inhibitors 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 people about working at home for that period of time without engaging in human interaction or coming into the office and having a coffee with your peers and your friends, because it (working remotely) can be quite isolating."

"It really does revolve around the implicit trust that this (program) provides the employees. I view it as a tool. It's not an entitlement, it's not a bonus. It's something that they can use to choose how they approach the work that they are doing. And in fact, my style is pretty much hands off. I expect them to come to me for assistance in day to day activities if and when they need it. Otherwise, I hope they will feel comfortable in performing their duties unencumbered by managerial supervision. And part of that is I trust them that when they are working at home they are working."

– Chris Ring, Manager

Employee Comments

"For me, IBM is the perfect employer for the following reasons:

- I love my job
- I've got a fabulous manager who makes my job easy
- I love working from home
- 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 same 4 perks."

“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.

Contact Information

Rena Chenoy
Global Program Manager - Work/Life, Flexibility and Mobility Department
IBM Corporation
53 Ferrier Avenue
Toronto, Ontario, Canada M4K 3H5
647-436-5639
rchenoy@ca.ibm.com

Program***New Approach for Flexible Work Arrangements*****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 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.
- Awareness that the diversity of the customer base of physicians requires the sales force to be more diverse.
- Appreciation of cultural differences among patients who use the products as well as the need for diversity in clinical trials.

Implementation Approach

The program was initially rolled out in 2000. Every management group and everyone in headquarters went through training, which took about an hour for employees and a bit longer for managers. Currently AZ is working to integrate diversity and work-life perspectives into other training courses, and to integrate work-life goals into diversity action plans.

Current Obstacles

Management jobs in field sales demand long hours and travel and advancement often requires relocation. As a result, many qualified women are reluctant to move from a sales representative position into management. The demands of the industry are resulting in an increase in the amount and pace of work. In this climate, some managers worry that flexibility might impact productivity.

Overcoming Obstacles Plans for overcoming obstacles include the following.

- Providing sufficient flexibility to enable people to develop.
- Re-considering the way jobs are structured and developing new ways work can be accomplished.
- Looking at ways to help employees manage the demands of working globally, such as making more use of technology vs. traveling abroad to attend a meeting.

Benefits

Benefits of flexible work arrangements include the following:

- Attraction and retention of diverse talent.
- An increase in employee engagement – internal surveys show that those who have the flexibility they need to manage the demands of work and personal life are more engaged and have better scores on stress and burnout indices.
- Additional opportunities for women to advance.

Measurement

There is a tracking system but it undercounts. It is more accurate for teleworking than other things like flex-time. 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. 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 around work-life, and a set of questions around diversity. Built into the survey is a fairly traditional section on employee engagement. In the US there is an additional set of 10 questions that correlate with high performing teams in the field. The index is called the AstraZeneca 10.

Factors in Success

While management support is to some extent contingent on the ability of those who use flexible work arrangements to meet goals and deliver results, senior people are willing to be fairly strong advocates. They feel that flexibility is a big part of AstraZeneca’s culture and that flexibility is part of who we are; it’s the way we do business; and the way we will continue. There are public/published statements from senior people supporting flexibility. There are departments that are better at it than others. There are managers who are not supportive of it and managers who are. Even so, flexible work arrangements are an important part of the culture.

Manager Comments

“[When I first heard about the 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. AstraZeneca 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 fulltime in the office.”

“[Since the initiation of flexible working arrangements] I have had 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 working 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.”

– Matt Pammer, Senior Director of Commercial Information Services

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.”

– *Stephanie Gauthier, Pharmaceutical Sales Specialist*

Recommendations

- Position work-life with appropriate other groups in the organization.
- Move away from the programmatic view and look at it with more of a cultural and “the way-we-work” lens. If an organization gets too focused on the programmatic side, the impact on the organization and its employees will not be as great.
- 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.”
- “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.”

Contact Information

Andi Moselle
Senior Manager, Work/Life
AstraZeneca Pharmaceuticals
1800 Concord Pike
Alapocas, AGC-725
Wilmington, DE 19850
302-886-7119
andrea.moselle@astrazeneca.com

Compelling Quotations

Compelling Quotations from Managers

Managers Overcome Initial Reluctance

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 Adjust

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.

The Role of Teams in Making FWAs 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...

The Importance of Trust

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:

It really does revolve around the implicit trust that this [program] provides the employees. I view it as a tool. It's not an entitlement, it's not a bonus. It's something that they can use to choose how they approach the work that they are doing. And in fact, my style is pretty much hands off. I expect them to come to me for assistance in day-to-day activities if and when they need it. Otherwise, I hope they will feel comfortable in performing their duties unencumbered by managerial supervision. And part of that is I trust them that when they are working at home they are working.

Overwhelming Benefits to the Organization

All the managers with whom we spoke perceived many benefits to the organizations. While acknowledging the difficulty of setting up new ways of working, learning new ways to manage, and tracking performance differently, almost all the managers said that the “benefits outweigh the disadvantages.” One manager said the following:

...it's so hard to find good people that we're better off making accommodations for the folks we know who have been with us [for some time]. It just makes financial sense to do that.

Another manager said, “We know what it's like to have people burn out.” Most managers felt that productivity was at least as strong if not better than before the program was implemented. Most mentioned the value of the programs for employee retention: “We keep people we would otherwise lose.” Still another said, “People are happier; people think it's a good option to have.”

Another manager echoed the thoughts of several managers:

My experience has been that people [on these programs] 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.

In all, we have summarized the comments of 18 out of 20 managers who have been won over, at least to some degree, by the success of these alternative work arrangements.

Compelling Quotations from Employees

When speaking directly about the flexible work arrangements offered in their organizations, employees' comments centered on four themes: personal benefits, increased productivity, feeling respected and understood by the organization, and increased loyalty to the organization.

Personal Benefits

The employees cited a number of reasons for needing flexibility in their work, with many noting that without such benefits they may not have been able to continue in their current positions. Whether the pressure was life stage, children, geographic issues, or almost anything else, the FWAs offered by their employers were regarded as key to balancing their work and home lives successfully.

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]

Increased Productivity

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.

As mentioned above, the managers concurred. One manager, not mentioned previously, said the following:

If you think about it, the theory of all this is that they're adults in every sense of the word outside of the organization. They're making family decisions, investment decisions, buying a house, car, where they live. They may have a clerical role in this division, but it doesn't mean that they aren't capable of thinking and performing, analyzing, hearing messages, and so forth, and I think it's just one more thing that—you know if you treat everybody as an adult, they're just going to perform better and be a part of the team and loyal.

Feeling Respected and Understood by the Organization

A key theme underlining the employees' willingness to work harder and do more for their organization seemed to be that the organization was listening to the employees, recognizing their wishes, and respecting their need for flexibility.

But I've never seen a company that allows you to, you know, we're all in the same boat with our family and personal lives and still trying to make the business needs and meet those. You know, just whatever it takes is kind of the mentality of, you know, let's get this all done. But at the same time, they really respect the fact that we have families and outside lives, just however we can meet those needs and work around those. It's been a pretty good win-win, I think.

I can tell you when I got a job here I had a lot of friends tell me that I'm selling my soul. Now I walk into this company and they say, "Welcome. Let's do a good job and here's this program for you where you don't even have to set an alarm." You know what? ... You can take control of your life. You know, I have—there's not a bad thing I can say about this company. I am nothing but proud to say that I work for this company. You know, I'll go out—we'll go out for lunch or happy hour with friends, you know, on a Friday afternoon and all I hear is people complaining about their job.

All of the elements involved in offering flexibility from the employees', the managers', and the organizations' points of view were succinctly expressed by one of the managers who stated:

Well I think, you know, sort of in a nutshell, the thing is it's a marriage of two different ideas. It's the opportunity to increase productivity for and from a company standpoint and as far as being able to focus our work and getting greater results. But that goes along with providing an employee and supporting employees' need for flexible work arrangements to address their everyday issues, now, you know, with the current workforce with issues that might be related to taking care of a family and taking time away from the office for an elderly parent or whatever it might be. Or they function on a different level to be more effective at different parts of the day. So it's kind of understanding that from an employee perspective.

Increased Loyalty

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 arrangements confer upon them. One employee summed it up nicely: “When I am happy, I am happy to do my work.”

Conclusion

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 (Kosseck, 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.

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?

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Boston College
Center for Work & Family
22 Stone Avenue
Chestnut Hill, MA 02467
Phone: (617) 552-2844
Fax: (617) 552-2859
E-mail: cwf@bc.edu
Web site: www.bc.edu/cwf