



## A CURATED RESEARCH REPORT

Prepared by  
CENTER FOR WOMEN AND BUSINESS AT BENTLEY UNIVERSITY

# The Value of Workplace Flex: Options, Benefits, and Success Stories



**BENTLEY**  
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## About the Gloria Cordes Larson Center for Women and Business (CWB)

*Advancing women and workplace diversity, equity, and inclusion.*

The CWB provides thought leadership and training on critical diversity, equity, and inclusion issues. CWB facilitators lead hundreds of sessions with businesses worldwide, providing knowledge and tools to foster inclusive organizations.

Our dynamic programs focusing on workplace inclusion range from strategic sessions for senior leaders to hands-on workshops for emerging professionals. Topics include:

- Corporate Culture, Unconscious Bias, and Inclusive Leadership
- Allyship, including Men in Partnership to Advance Women
- Building Confidence and Overcoming Unseen Barriers
- The Role of Courageous Conversations
- Mentorship, Sponsorship, and Networks
- Talent Pipeline Issues from Entry Level to the Boardroom
- The Impact of Intersectionality
- Authentic Leadership and Team Development
- Effective Negotiations
- Workplace Flex and Parental Leave
- Taking Employee Resource Groups to the Next Level
- Developing Diversity and Inclusion Metrics
- The Multigenerational Workforce—Issues and Impacts



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The data we reviewed for this report demonstrates what some progressive employers already know: flexible arrangements can enhance employee engagement, recruitment and retention, can improve productivity and cost savings, and can support social responsibility, diversity and inclusion efforts. Our extensive literature review revealed that changes in workforce demographics, globalization, and technology, along with better understanding of how flex helps the bottom line, are fueling overall growth in flexible arrangements.

Because the notion of flex has rapidly become deeper and broader, it can be a challenge to find what you need in literature and research. To make it easier, we've organized this report into succinct topics:

- Factors driving flex, including commitment to inclusion, gender, generation, globalization, competition, and technology.
- Recent statistics on employee/employer attitudes about flex, followed by the documented benefits for both employee and employer, and a look at the types of flexible work arrangements.
- Flex success stories from different businesses and a look at controversy and potential pitfalls.
- Specific recommendations for employers and employees, and a glossary of terms.

*To produce this report, the Center for Women and Business reviewed more than 200 sources, including research reports, survey results, and media coverage.*

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## EXECUTIVE SUMMARY

A **broad definition of workplace flexibility** is the outcome of employers and employees working together to determine when, where and how much an employee works in order to meet mutual needs. It refers to practices that impact when, how, where, and how much people work. This report, based on a review of over 200 sources, explores the “state of the state” when it comes to the expansive array of flexible options that exist in the workplace today.

We begin with **exploration of the major trends** driving flexible work arrangements in organizations, including commitment to inclusion, gender, generational factors, global competition, and technology.

The report examines **noteworthy statistics** that demonstrate the overall value of flex, attitudes toward flex, and what’s being utilized most. Statistics consistently demonstrate that flexibility is a top consideration for employees in choosing jobs, and Gallup’s study asserts that workers are pushing companies to break down the long-established structures and policies that have historically influenced their workdays.

We identify and discuss the **primary benefits** for employers and employees, including: reduced costs resulting from greater efficiency and productivity; employee wellness and satisfaction; workplace recruitment and retention; sustainability factors such as reduction in real estate footprints; and stronger cultures.

The report delves into the **primary categories of flexible work arrangements** such as parental and family leave, remote work, flexible work, and unlimited vacation, while also citing a potpourri of other offerings ranging from sabbaticals and paid time off to hoteling and relaxed dress codes.

Readers will find numerous **success stories** that profile best practices. They include: programs that are strategic and comprehensive, such as PwC’s approach to achieving a culture of flexibility; what a flexible work program looks like in small companies such as Honest Tea and large organizations like State Street; parental leave programs that Liberty Mutual and others offer; and how Blue Cross Blue Shield supports holistic wellness for its employees. This section also highlights niche programs like Ikea’s support for employees impacted by DACA. In addition, this part of the report provides good examples of how companies prioritize the benefits they derive from flexible options and the importance of communication.

In the section titled “When Flex Misses the Mark,” we **examine the negative impact of flexibility stigma** when employees who use flex are viewed as less committed or less likely to receive raises and promotions. This section of the report also considers: the drawbacks of informal programs that are implemented inequitably or without transparency; the challenges for frontline managers who are so important to program success; why failure to utilize metrics is problematic; and the relevance of highly visible flex rollbacks by some major employers.

The report includes **concrete recommendations for organizations and individuals**. For employers we share four major steps to take when introducing or refining flexible arrangements. They include: 1) Conduct a self-assessment 2) Develop broad goals 3) Implement your program 4) Measure your results and monitor success. For employees, we address how to get started with a plan, specific actions to take with managers and teams, and how to stay organized when working from home. This section includes additional resources for organizations and individuals.

The report concludes with a **glossary of terms** related to flexible work arrangements.



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## WHAT'S DRIVING FLEX?

Organizations are establishing workplace flex offerings at a rapid pace in an era of growing competition for market share and valuable employees, increased commitment to social responsibility, and more complex dynamics around work, home-life, workplace diversity, and inclusion. The most progressive employers understand that workplace flexibility must be fully integrated into their culture, utilizing it as a valued business tool rather than an individual accommodation.<sup>1</sup> Key drivers and dynamics influencing flex adoption are commitments to inclusion, demographics such as gender and generation, globalization, and technology.

### Commitment to Inclusion

Flexibility policies can support and demonstrate an organization's commitment to diversity and inclusion by recognizing the unique needs of different workers. For starters, forward-thinking employers honor new definitions of "family" and adapt policies to follow suit. They recognize that more than 40 million U.S. citizens annually who are employed and already caring for children are also helping provide care to an elderly relative or friend<sup>2</sup> or that workers with disabilities who have limited mobility to travel can provide significant value working from home.<sup>3</sup>

**"...The workforce as a whole is asking for the freedom to help define when, where and how work gets done... it is not only important to ADP being an employer of choice to attract and retain talent, it also has an impact on our diversity and inclusion efforts."**<sup>4</sup>

—Amy Freshman, Senior Director, ADP Global Workplace Enablement & HR Strategy and Planning

## The Gender Factor

Women still carry the brunt of the burden at home when it comes to children, household duties, and extended family. Yet according to the U.S. Council of Economic Advisers, the number of U.S. women aged 25 to 54 participating in the workforce has increased from about half to 75 percent in the last few decades. And most CEOs know that gender-diverse teams lead to better performance, so the imperative to offer flex based on gender concerns alone is significant.<sup>5</sup>

Data makes a strong case for the importance of flexible work options during the motherhood years to improve gender parity in the workplace, increase women's financial security, and decrease the critical gender pay gap for women when they reach retirement.<sup>6</sup> Research from Boston Consulting Group (BCG), Bain and others reveals the impact of flex – and the lack of it – on women's career trajectories.

- Consistent with other research, Bain finds that women value flex more than any other factor in their career searches, including title, location, and pay, and that of the 30 percent of women who drop out of the workforce, 70 percent say they would have stayed if they had access to flexibility.<sup>7</sup>
- Other data reveals the negative consequences of being mommy-tracked after having children, resulting in less fulfilling roles and fewer stretch assignments critical to advancement.
- And BCG explores the connection between flex and lower engagement among senior-level women, which is particularly relevant because work-life balance is consistently ranked as a top factor influencing engagement. Findings show that companies with the highest engagement levels do not have a gender gap – women and men are equally engaged at all levels – but businesses with overall engagement challenges see senior women being disproportionately impacted and more likely to leave.<sup>8</sup>

## Generational Considerations

Almost 80 percent of **Millennials**, currently aged 19 to 36, are part of a dual-income couple working full-time,<sup>9</sup> and they rank flexibility as a significant factor when weighing employment priorities.<sup>10</sup> Millennials' desire for flex reflects the growing overlap of work and life, especially for those in this younger generation who are parents. 84 percent of Millennials report some degree of flexible work in their organizations,<sup>11</sup> and Deloitte research documents how important flex options are for employers to consider when seeking ways to retain this generation.<sup>12</sup>

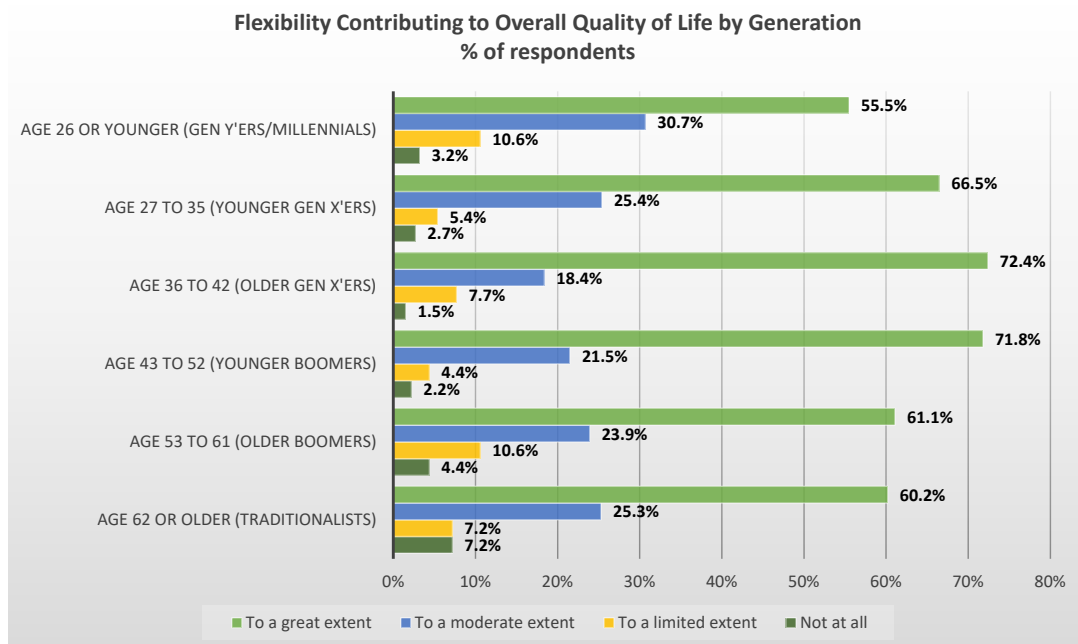
**Gen Xers**, the generation known for coining the term *work-life balance*, are currently between the ages of about 37 and 52 and, like some Baby Boomers, are often caring for both children and parents simultaneously, hence the term *sandwich generation*.<sup>13</sup> Those caring for multiple generations and also working full time need flex more than ever before, since both sides of the work-life equation

have become heavier in recent years. Globally, in fact, about half of managers report working more than 40 hours a week and nearly as many say their hours have increased in the past five years.<sup>14</sup>

In a recent Flexjobs survey, **Baby Boomers**, currently ages 53 to 70, ranked workplace flexibility as the most important factor when considering a job, with salary and work-life balance coming in second and third, respectively.<sup>15</sup> Organizations wanting to keep valuable older employees recognize their unique needs and the benefits they derive from flex, such as increased engagement, lower stress in the face of growing workloads, and improved emotional and physical health.

The common factors among the three generations dominating today's workforce? They all say they would change jobs for a particular benefit or perk<sup>16</sup> and all agree that flexible options contribute to overall quality of life.<sup>17</sup>[See Figure 1]

Figure 1



\* Items developed by the Sloan Center on Aging & Work, 2007

Source: Roundtree, L and Greenfield, S. *Flex Strategies to Attract, Engage & Retain Older Workers*.

The Sloan Center on Aging & Work at Boston College, 2012. Page 10.

## Globalization and Competition

With increased global competition, businesses fight for every way possible to be more competitive.

- Flex reduces costs and enhances revenue via employees who are healthier, more productive, and more engaged. It also reduces travel costs, sick time, and more. A global workforce connected virtually is efficient and productive, adapting easily to time zone differences.
- Businesses with telecommuting options support global sustainability by reducing carbon emissions and workplace footprints.<sup>18</sup>
- And even smaller companies are part of this mix. They often need to compete for talent based on culture<sup>19</sup> and can more easily create a flexible environment to accommodate employees' lifestyles.

Public policy also factors into the global perspective. For instance, the pace of globalization could drive the U.S. to look at mandates,<sup>20</sup> particularly since the U.S. remains one of just three countries without paid maternity leave.<sup>21</sup> Much of this depends on how quickly and aggressively U.S.-based businesses develop more generous policies and the rate at which foreign countries mandate programs that impact businesses, competition and employees worldwide.

## Technology

The rapid growth of tech tools is enabling more efficient, effective flex options for employers and employees alike. In a recent global survey, a significant majority of participants said that the right technology could solve any issues remote workers might face, and they cited video conferencing as a preferred collaborative tool.<sup>22</sup> Indeed, options like Slack, Skype, GotoMeeting, Zoom, Hangouts and even smartphones not only keep employees in contact with each other, but also keep them working even when they are offsite.

McKinsey reports that digital platforms are transforming independent work, building upon the proliferation of mobile devices, the significant number of workers and customers they can reach, and the ability to tap into real-time data and communications.<sup>23</sup> McKinsey's data suggests that we've only begun to see the impact of tech platforms.

And a Deloitte report notes that while automation is already impacting flexible work, it is likely to bring the next wave of change as well.<sup>24</sup> Millennials in particular appreciate the benefits of technology when it comes to productivity, economic growth, creativity, and knowledge, and they see technology as a route to increasing their influence within organizations.

### Flex at Work: Adobe Systems Paid Leave Policy

Adobe is committed to compensating for what it views as "slim to nonexistent" government mandates for paid leave in the U.S. and believes that private companies must find ways to support employees during major life events.<sup>25</sup>

Adobe was among the first tech companies to significantly expand its family leave programs. In 2015, it extended the program to 26 weeks of fully paid time off for birth or adoption of a child. The policy currently applies to 13 countries with nine more to be added this year. The company boasts a 99 percent return rate among those using the program.



## A GLANCE AT THE STATS

We reviewed numerous reports on employer and employee attitudes about flexible work options, including the reasons they are valued and the impact they have. Because the flex landscape is growing quickly and employer attitudes and offerings are evolving rapidly, we focused on the most recent data.

### The Overall Value of Flex

In its recent report on the State of the American Workplace, Gallup cites findings in employee attitudes that are consistent with other data: “The benefits that employees truly care about are those that offer them greater flexibility, autonomy, and the ability to lead a better life.”<sup>26</sup>

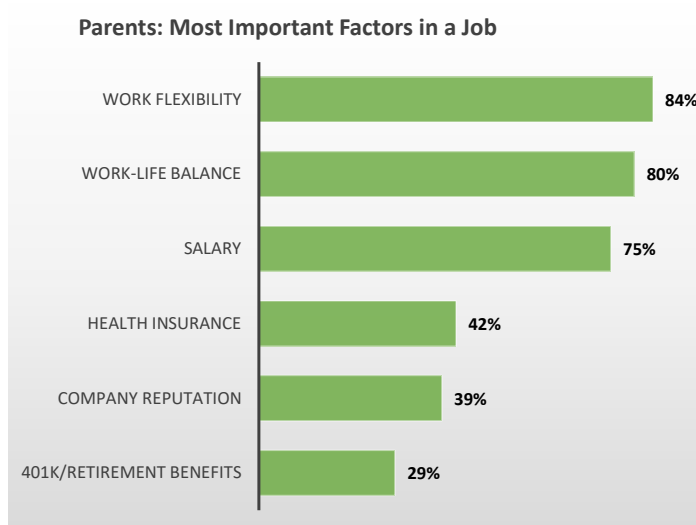
While flexibility is not a reality for all workers, many want it to be. Gallup consistently finds that flex schedules and work-from-home options are important to employees and concludes that workers are pushing companies to break down the long-established structures and policies that have historically influenced their workdays.

A Society for Human Resource Management (SHRM) report supports Gallup’s findings, asserting that the majority of employees view the flexibility to balance work and life as a very important aspect of job satisfaction. In fact, the SHRM report shows an increase of 10 percentage points over its previous year’s survey, and the two leading reasons employees give for planning to stay in their current organizations are pay (45 percent) and flexibility to balance work and life (42 percent).<sup>27</sup>

Another examination of workplace flexibility indicates that professionals whose employer makes work-life balance easier are 79 percent more satisfied with their jobs, 73 percent more loyal to their company and 72 percent less likely to be distracted at work by stress and personal issues.<sup>28</sup>

FlexJobs, a flex-centric job-search platform, surveyed 1,200 parents with children 18 and younger living at home, and found that work flexibility is the number one factor when considering a potential job. Moreover, only 4 percent of parents say they are concerned about a flexible work arrangement hurting their career progress. When asked to choose the “most important” factors in a potential job, 84 percent of parents reported “Work Flexibility” as most important.<sup>29</sup> [See Figure 2]

Figure 2



Source: Reynolds, B. “Survey: Parents Rank Work Flexibility Ahead of Salary.” FlexJobs, 12 August 2016, [www.flexjobs.com/blog/post/survey-parents-rank-work-flexibility-ahead-salary/](http://www.flexjobs.com/blog/post/survey-parents-rank-work-flexibility-ahead-salary/).

**“Research (our own and others’) shows that employees are healthier, experience less stress, and are more productive and engaged when they effectively make choices about how, where and when they work.”<sup>30</sup>**

—Ellen Ernst Kossek, University Distinguished Professor, Michigan State University, and Kelly Hannum, Researcher, Center for Creative Leadership



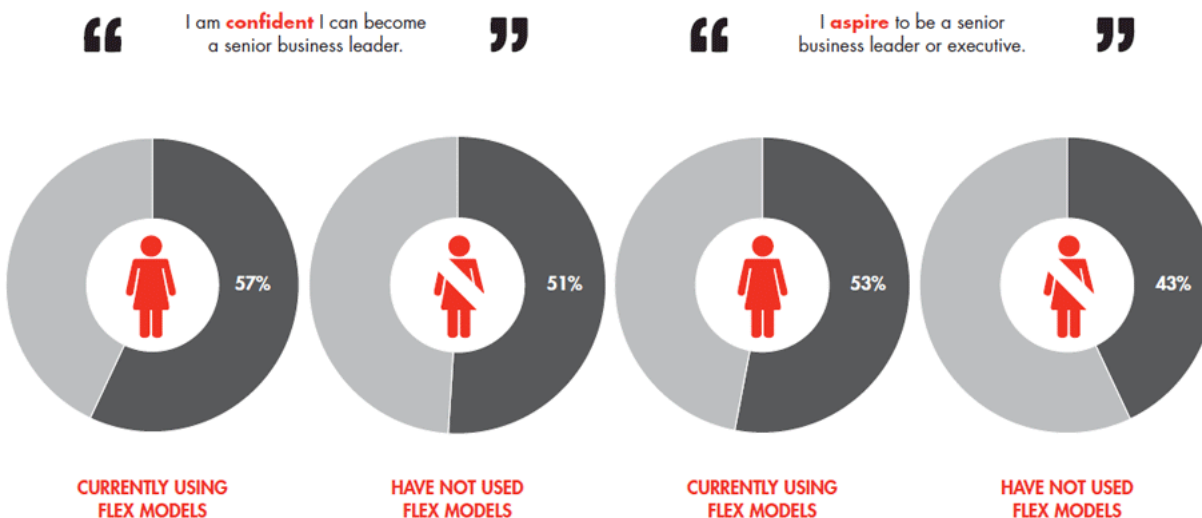
## What Women Think

Bain's research into women's views is particularly insightful, showing that flexibility is key for those in junior and middle-management positions as they navigate whether and how to balance their career advancement with family needs. Bain found that about 50 percent of women utilizing flex are experienced employees or junior to middle managers who are doing so primarily to care for children.<sup>31</sup>

The Bain findings help debunk the myth that women who desire and use flexible options are less ambitious. In fact, the findings assert the opposite to be true. The report concludes, "Women who work flexibly are equally—if not more—serious and committed to reaching their full career potential than those who don't. [See Figure 3] Furthermore, our findings show that those working flexibly want to advance as far as possible, but they are willing to take different routes to achieve their career goals."<sup>32</sup>

Figure 3

Women who work flexibly are equally, if not more, confident and committed to career progression than women who don't.



Source: Sanders, M. et al. "The Power of Flexibility: A Key Enabler to Boost Gender Parity and Employee Engagement." Bain & Company, 4 February 2016, [www.bain.com/publications/articles/the-power-of-flexibility.aspx](http://www.bain.com/publications/articles/the-power-of-flexibility.aspx).

**"I was concerned that if I became a leader I would have less time and focus for my family. We need to change the perception that leaders have to choose between success in their career and a sustainable family life."**<sup>33</sup>

—Marivic Espano, Chairperson and CEO, Grant Thornton Philippines

## Millennial Viewpoints

Deloitte examined Millennials' views and found that flexible work is a feature of most of this younger generation's working lives. They view flex as a link to improved organizational performance, personal benefit, and loyalty. Sixty-seven percent of Millennial study participants said that, within certain limits, they were able to start and finish work at times they choose. Compared to a similar survey only one year earlier, respondents whose employees allow them to work from remote locations jumped 21 points from 43 percent to 64 percent, reflecting how rapidly technology is growing as a factor in mobile work and how much employers are embracing this approach.<sup>34</sup>

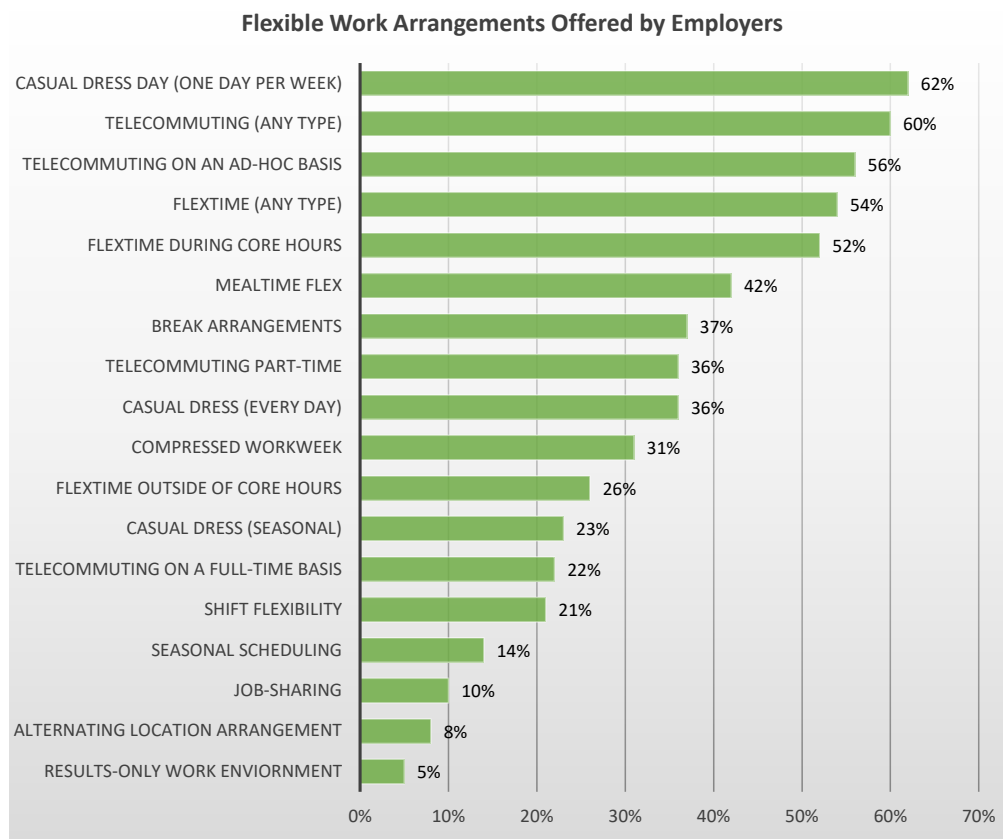
Another important takeaway from the Deloitte survey is the solid foundation of trust that enables organizations to increasingly offer and operate flexible

working arrangements. This finding reinforces the anecdotal evidence and literature that identify trust as a critical factor in cultures of flexibility.

## What Employers are Offering

The SHRM report cited earlier indicates that employers are responding quickly to employees' desires. Supporting this, Gallup's research reveals that organizations are offering varied types of flexibility and related benefits to help employees manage their well-being, reduce expenses, and more, and that small companies are positioning themselves competitively by offering perks like free meals, pet-friendly options, remote work, independence, and unique bonuses.<sup>35</sup> Figure 4 depicts the most common flex offerings in today's organizations.

**Figure 4**



Source: Society for Human Resource Management. SHRM Research: Flexible Work Arrangements. 2015.

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## BENEFITS TO EMPLOYERS AND EMPLOYEES

The benefits of flexible work arrangements for employer and employee alike are well-documented and often one-in-the-same. For the employer, a sampling includes financial savings, increased productivity, lower turnover, and reduced absences. Employees enjoy positive engagement in work and life, improved health, reduced stress, healthier relationships, and greater happiness. And both directly benefit from such factors as improved corporate culture, time savings, and efficiency. We discuss a few major themes below.

### Workplace Costs

The data increasingly indicates that the costs of offering paid leave are minimal. A study in California, which is one of a handful of states to mandate paid leave, showed that 87 percent of employers believed offering paid leave cost them nothing, while 9 percent said it actually helped them save money.<sup>36</sup> And BCG's research among 250 companies with recently new or expanded paid family leave policies saw that for the first time a wide range of employers perceive multiple benefits, including improved retention, that outweigh the costs of paid parental leave.<sup>37</sup> Many companies said that the costs of providing the benefit itself are lower than expected, refuting the notion that costs are a barrier to such benefits.

Absenteeism and its impact on costs is worth recognizing, since flexible arrangements can reduce employee absenteeism. The U.S. Council of Economic Advisers cites a study estimating that employee stress related to worries about balancing obligations with children and work leads to greater rates of absenteeism, with such costs to businesses ranging from \$496 to \$1,984 per employee per year.<sup>38</sup> The Council concludes that “wholesale adoption of flexible workplace schedules could save about \$15 billion a year.”<sup>39</sup>

Flex can be a powerful business strategy that leads to lower costs, increased productivity, and improved customer service. Flex...

- Reduces healthcare costs.
- Reduces physical office space and parking needs and costs.
- Improves sustainability.
- Overcomes geographical constraints, often global.
- Overcomes time zone issues.
- Helps meet client needs requiring different times for employees to be accessible.
- Puts the focus on results rather than face time.
- Allows employees to work at their individual peak productivity.
- Let's employees reduce their commutes or avoid peak commute times.
- Allows employees to work with fewer distractions.
- Improves employee performance.

**“When creating a company culture that condones workplace flexibility... as employees feel the autonomy, trust and care granted by their managers, they will feel they have the freedom to produce their best work.”<sup>40</sup>**

—Gary Beckstrand, Vice President, O.C. Tanner

## Worker Health and Well-being

Numerous studies and independent reviews of scientific literature make a strong case for the extensive benefits flexible work can offer, including: greater work-life balance; reduced burnout; fatigue; anxiety; and stress; and less negative spillover from work to home.<sup>41</sup>

A wide-ranging study of European workers identified flexibility as the single most important factor in job satisfaction,<sup>42</sup> and a FlexJobs survey of over 3,100 professionals found that 87 percent believed a flexible job would lower their stress, while 97 percent thought it would have a positive impact on their overall quality of life.<sup>43</sup> *Since about 70 percent of companies say stress is a top problem for their organization, these views should be taken seriously.*<sup>44</sup>

## Employee Recruitment and Retention

A Society of Human Resource Managers (SHRM) survey found that 89 percent of companies reported better retention simply by offering flexible work options, regardless of whether employees are utilizing them or not.<sup>45</sup> This highlights how powerful the desire for control over one's own schedule can be.

Employers concerned about managing and retaining Millennials will find a recent Deloitte report on these younger workers of interest: Millennials closely link retention with flex, and when flex arrangements are most ingrained in the culture, they perceive levels of trust within the organization to be the greatest.<sup>46</sup>

Flex not only increases trust among all members of the organization, it increases employee loyalty and enhances engagement. Giving employees control over their schedules enables people to bring their authentic selves to work.

Forbes reports that flexible options are particularly useful for entrepreneurs trying to recruit and retain top-tier, highly talented women and men who may not fit into a traditional work situation but who will

bring a wealth of experience, education, passion and skills to a new company.<sup>47</sup> And when it comes to gender, Catalyst reports that women downsize their aspirations at a greater rate without flex than do men. This is a particular concern since ample data correlates women's downsized aspirations with pipeline drop-off.<sup>48</sup>

### Flex at Work: State Street Flex Work Program

Flexible work arrangements have existed at State Street for more than a decade through



its *Flex Work Program*. This program includes altering start and finish times for the work day, working under a compressed schedule, reducing standard work hours, working remotely and job sharing. Nearly 78 percent of its global workforce reported in a recent employee survey that they use some sort of flexibility in their work schedule.

State Street has also found a strong business case for its workplace flexibility initiatives. Flex improves employee engagement and productivity, talent retention and recruiting efforts, and collaboration between global teams, while decreasing commuting costs for employees. The remote work capability has been key in supporting State Street efforts to maximize workspace utilization and business continuity plans.<sup>49</sup>

## TYPES OF FLEX

Flexible workplace arrangements, broadly defined, are workplace practices that impact when people work, where they work, and how much they work, including time off after childbirth or other life events.<sup>50</sup> This section takes a look at the primary variations of flexible work arrangements organizations offer and employees seek. Please see the Glossary on page 27 for specific definitions of the many specific terms and types of flexible options.

### Parental and Family Leave

A discussion of parental and family leave has to start with a basic understanding of the Family and Medical Leave Act (FMLA).<sup>51</sup> This is a national mandate requiring 12 weeks of guaranteed, job-protected unpaid leave for organizations with 50 or more employees in a 75-mile radius to employees who have worked at least 1,250 hours in the previous year, for maternity, paternity, adoption, and important personal medical needs, including medical caregiving. According to the U.S. Department of Labor, only about 12 percent of U.S. non-government workers have access to paid family leave.<sup>52</sup> The U.S. is one of only three countries in the world that does not mandate paid parental leave. (The others are Papua New Guinea and Lesotho.)

An increasing number of private employers are introducing and expanding paid parental leave programs, often in response to feedback from employees via employee resource groups (ERGs) and engagement surveys. Among parents who took leave for birth or adoption in recent years, mothers took a median of 11 weeks and fathers took about one week. When women take maternity leave, about half say they wish they'd taken more time. Importantly, women are about twice as likely as men to say taking parental leave has a negative impact on their job or career.<sup>53</sup>

### Flex at Work: Parental and Family Leave

In 2018, Walmart introduced a new parental leave policy that's more generous than what most U.S. companies currently offer: ten paid weeks for birth moms and six weeks for other new parents, regardless of whether they are hourly or salaried. While Walmart's option provides less time than many progressive companies' offerings, the program is significant because of the sheer number of employees (hundreds of thousands) it impacts and the pressure it puts on the many firms who work with Walmart to make similar moves.<sup>54</sup>



In response to employee feedback that the existing



family leave policy was not working—it was too short and the transition back to work was stressful—Amazon instituted a 20-week parental leave plan for birth mothers and six weeks for all other new parents. The new benefits apply to all full-time hourly and salaried employees (30 or more hours a week), including more than 100,000 people who work in customer service and fulfillment centers.

Nearly three-quarters of employees who have taken advantage of the paid leave benefits are hourly and 60 percent are men. In addition to longer paid family leave, Amazon also offers a “ramp-back” program and a leave sharing program that have been termed “revolutionary.”<sup>55</sup>



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## Remote Working and Related Variations

Remote work often goes by other names, such as virtual work, telecommuting, working from home, and telework.<sup>56</sup> (Purists differentiate among some of these terms, which are broken down in the Glossary on page 27.) Remote work is convenient because it captures different scenarios such as the employee who works from home, the one who works at a coffee shop, another who works in a co-working space, and yet another who spends time at a client's location.

Employers lose an estimated \$1.8 trillion a year in productivity from factors like excessive commuting, water cooler gossip, and health issues. And according to the State of Work Productivity Report, 65 percent of full-time employees believe a remote work schedule would improve their productivity, while a separate report found two-thirds of managers reported an overall productivity increase from their remote employees.<sup>57</sup> With employees and employers finding it harder than ever to maximize productivity in a traditional work environment, remote work offers an attractive solution.

## Flexible Schedules

Flexible schedules most often come in the form of flextime, compressed workweeks, shift work, part-time, and job-sharing.<sup>58</sup> In 2014, the U.S. Council of Economic Advisers reported that more than three quarters of all employers allowed at least some workers to flex their start and stop times in some fashion, while 56 percent of full-time workers said they have flexible work hours and 22 percent said they flex in location.<sup>59</sup>

Employees can utilize workplace flexibility in the short-term, perhaps to address a temporary personal issue related to illness or child needs, or long-term, often to address commuting challenges or personal lifestyle needs.<sup>60</sup>

Flexibility can be more challenging to offer in industries where remote work is difficult. Common examples of work environments requiring physical presence are manufacturing, retail, and restaurants. In these cases, flexible schedules play a critical role in alleviating scheduling challenges for employees and can include trading shifts, varied start and end times, unpaid time off, or employee-crafted schedules.

## Unlimited Vacation

Many employers have introduced unlimited vacation, experiencing mixed results. When it works, employees can enjoy enhanced flexibility and control over their lives while employers can gain a recruiting edge and save money. The literature makes it clear that unlimited vacation works best in organizations with strong cultures of trust and respect.<sup>61</sup>

### Flex at Work: Kronos Unlimited Vacation

Kronos introduced  
unlimited vacation  
to attract talent in a



competitive job market. Implementation challenges included: managers who thought people would request too much time or who didn't like ambiguity; people who viewed vacation accrual as a benefit; and employees who thought it was just a cost-saving move.

To address this, Kronos provided training and individual coaching to managers and employees. Management also reinvested savings in other benefits, including: enhanced parental leave; an increased 401(k) match; a scholarship program; and child care assistance.

Kronos attributes the program's success to a supportive culture and getting the details right.<sup>62</sup>

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## Other Flexible Options

Employers looking for a competitive edge, concerned about social responsibility, dedicated to greater inclusion, or seeking a healthier, happier workforce regularly pursue new and creative approaches to flexibility and are open to employee input about what the offerings should look like. The array of flexible options run the gamut from addressing serious needs to fulfilling personal preferences. A sampling includes:

- Paid leave for medical issues
- Financial and investment counseling
- Wellness offerings such as walking stations, yoga, meditation, and health food cafes
- Shared sick time
- Tuition assistance
- Onsite amenities like massages, car washes, and bike repairs
- “Baby cash” in the form of a one-time stipend
- Professional HR support and pro bono immigration legal services for employees working under DACA-issued work permits
- Job rotation
- Relaxed dress codes
- Sabbaticals
- Hoteling
- Pet-friendly policies and pet insurance

- Flexible coupons employees can use for downtime without pay
- Covering the cost of gender reassignment surgery
- Summer Fridays off or from home
- Nursing rooms
- Options for paid time to volunteer
- Job sharing

Many of these benefits are defined in the Glossary on page 27.

### Flex at Work: IBM Paid Time to Volunteer

A great example of a generous paid time off program that enables employees to volunteer is IBM's Corporate Service Corp, which matches employees with worldwide volunteer projects. In addition to providing employee enrichment, the company benefits from the diverse perspectives employees bring back to the office when they return.<sup>63</sup>



## WHEN FLEX WORKS BEST - SUCCESS STORIES

Employers find success in implementing flexible work arrangements for numerous reasons and through a variety of approaches, and this section highlights some winning strategies along with real workplace examples. We highlight sophisticated, wide-reaching approaches as well as simpler, commonsense interventions.

Figure 5 illustrates a workplace flexibility spectrum provided by the Society for Human Resource Management.<sup>64</sup> Organizations at the left side of the scale are mostly making individual accommodations for employees on a case by case basis. Employers operating at this level award flexible options in a highly

subjective manner; they risk bias in implementation and employee flexibility stigma (see page 19). Organizations at the most advanced spot on the continuum have fully integrated flexible options into their culture and business plans; at these firms, flexibility is a valuable tool for meeting business objectives.

As you review the success stories on the following pages, consider where each organization falls on this spectrum and where your own organization might find itself. What might you learn from the success stories profiled here? What can you do to migrate to a more sophisticated, effective level?

Figure 5



Source: Kossek, E. et al. Leveraging Workplace Flexibility for Engagement and Productivity. SHRM Foundation's Effective Practice Guidelines Series, 2014. Page 8.

## P&G has made its *flex@work* program a strategic priority.

P&G views its “flex@work” program as a core business strategy that allows employees to flex their workdays, work from home, compress their work weeks, or work part-time, but the firm has challenged itself to expand and personalize its flexibility initiatives. The new approach has resulted in expanded parental leave, flexible vacation options, investment and savings plans, physical location support, more mobile arrangements, and critically, more open discussions between managers and their teams about flexibility needs.



HR and regional leaders work together to develop successful plans, flexibility is part of performance review discussions, and managers receive flex training and toolkits. P&G believes that its commitment to flexibility demonstrates an understanding that work-life integration is the new norm.<sup>65</sup>

## Moody's communications sent a clear message: we are committed to flex.

Moody's approach to discussing its flex program

# MOODY'S

demonstrates the value of communicating the benefits of flexible options throughout an organization. The firm organized panel discussions internationally to showcase employees who had been promoted while working in a variety of flexible arrangements, such as telecommuting and part-time work. The events attracted standing-room-only crowds and were open to other employees via conference call. In addition, the company held a town hall so managers could discuss their commitment to flexible arrangements and highlight business leaders who utilize flex.<sup>66</sup>

## MIT Sloan School of Management piloted a simple but effective flex program.

A work team at MIT's Sloan School of Management established a simple yet highly effective flex program that demonstrates how easy it is to pilot an offering even if an organization lacks significant resources for development, training or research. In collaboration with the human resources department, they developed a program with these hallmarks:



- Everyone is encouraged to work remotely at least two to three days per week.
- Wednesdays are the group's “work in the office if you physically can” days.
- Employees don't need to work a strict 9-to-5 schedule but are encouraged to be mindful of regular business hours.
- Employees should not feel the need to be connected 24/7.

After 18 months, 100 percent of the employees on this small team said they would recommend it to all employees at MIT and 62 percent recorded improved feelings of trust and respect among team members. A team leader summed things up this way: “Perhaps the most surprising (outcome) is how our flex-time program has impacted employee trust. Based on this stat alone, it's clear to me that people who feel trusted will get their work done efficiently while improving overall morale and company culture.”<sup>67</sup>

## HubSpot creates a culture of “use your best judgment.”

HubSpot takes a simple but effective approach to flexible work that



is in keeping with its culture: “use good judgment.” This translates to employees working their plans out with their teams regarding hours and location in order to produce the best outcomes.

A leader explains how it works for her team, saying, “A lot of people on my team write for the HubSpot blog...they are writing and editing all day and need a long stretch of time to write with no interruptions, so working from home makes sense.” HubSpot also touts its sabbatical program which gives employees a chance to recharge. When “HubSpotters” “turn five,” they receive full pay for a four-week sabbatical.<sup>68</sup>

## Salesforce offers flexible time-off and a one-week annual sabbatical.

Salesforce, ranked first in Fortune’s 2018 roundup of top companies to work, is recognized for its overall commitment to culture, which includes flexibility and philanthropy. Perks are extensive and varied, including mindfulness rooms, financial incentives to employees who refer new hires, pay for 56 hours per year to volunteer outside of work, and four extra floating holidays per year. The firm’s flexible time-off policy allows many employees to take time when they need it rather than worrying about accrual based on their tenure, which is the traditional approach.



Salesforce also offers a generous sabbatical program so that workers can take one week annually of paid time for rejuvenation and personal pursuits, allowing them to use the week each year or bank it to use later.<sup>69&70</sup>

## Unilever's “work anytime anywhere” policy highlights cost savings.

A company-wide Unilever policy permits 100,000 employees—everyone except factory production workers—to work anytime, anywhere, as long as they meet business needs. Leadership identified the following benefits when making the business case for the policy:<sup>71</sup>



- Upgraded technology that would enhance the firm’s competitive edge; any increased costs are offset by other savings.
- Reduced real estate because cubicles and offices are converted to communal facilities, thereby reducing space requirements by 30 percent.
- Improved employee health thanks to onsite fitness facilities that increase employee satisfaction, help reduce illness and cut insurance costs.
- Greater work-life balance by empowering workers to achieve it, resulting in increased satisfaction ratings and improved recruitment.
- More successful sustainability through a decreased environmental footprint from reduced travel, office energy costs, real estate needs, and paperwork.
- Enhanced retention and engagement due to overall flexibility.



## First Data offers an inclusive family leave that recognizes all types of families.

In 2017, First Data enhanced its family policy to ensure

**First Data®**

inclusion of more diverse families. All parents, regardless of gender, receive the necessary time to care for their new child. The policy distinguishes between primary and secondary caregivers, supporting the firm's diverse families. Primary caregivers in a birth or adoption receive 100 percent pay and benefits for up to 12 weeks in a rolling 12-month period. Primary caregivers of a child being placed through foster care also receive 100 percent pay in a 12-month rolling period but for 4 weeks.

First Data has been a recipient of the Human Rights Campaign Corporate Equality Index award for three straight years. The firm believes in supporting not only traditional families but single parents and same-sex parents.<sup>72</sup>

## IKEA offers free legal services to employees with DACA-issued permits.

Ikea has introduced initiatives to help employees who work under DACA-issued work permits. The



company provides HR business partners to meet with affected employees to communicate and explain how they can support them. It also offers two hours of free legal services to these workers to consult with licensed attorneys on specific legal questions. Ikea believes this benefit for "Dreamers" demonstrates its core value of caring for people and the planet and its belief that everyone has the right to pursue a better life.<sup>73</sup>

## Booz Allen Hamilton's office space "hotel" fosters team collaboration.

A number of years ago, before the

**Booz | Allen | Hamilton**

term "hoteling" was well recognized, Booz Allen Hamilton began a gradual shift in its Washington area offices towards hoteling, creating a set-up in which workers don't have their own offices or desks but instead reserve a work space when they need to come to the office. While it helped shrink its real estate footprint and reduce commute times for many of its workers, the firm struggled somewhat with keeping people connected to their teams. To address the problem, management introduced a new concept called "neighborhoods," in which a supervisor reserves a whole block of desks so a team can get together more easily and collaborate.

Booz Allen's experience reflects that of other firms embracing unassigned workspaces: while the changes are often made to reduce energy and rent expenses, the new configurations reap unexpected benefits like encouraging employees to collaborate in person rather than via email. Indeed, some data indicates that traditional offices are utilized at a rate of 50 percent, owing to sick days, travel, vacation, and clutter.<sup>74</sup>

## Liberty Mutual strengthened its paid leave policy, providing more generous benefits.

Liberty Mutual has recently expanded and enhanced its parental, short-term disability and bereavement leave policies. Under



the program, new parents (including birth mothers, fathers, and adoptive parents) who have been with the company for at least one year can take up to 8 weeks of paid leave at 100 percent pay, and employees taking advantage of the company's short-term disability benefit can receive up to 8 weeks of 100 percent wage replacement during their absence from work regardless of tenure. For a mother giving birth, this means a total of up to 16 weeks of paid leave. If a spouse, domestic partner or child dies, employees can use the new bereavement policy to take 20 fully paid days away from work.<sup>75</sup>

## Globalization Partners offers a six-week sabbatical during the fifth year of work.

The goal of Globalization Partners' sabbatical program



is twofold: to reward employees and provide the rest they inevitably need from ongoing daily work. The firm provides the paid six-week break to eligible full-time employees during their fifth year with the firm. Workers need to request the time off at least three months in advance and present their sabbatical plans. Certain travel expenses are covered, depending on the nature of the sabbatical, and employees can request sabbaticals five years after the previous break.<sup>76</sup>

## Blue Cross Blue Shield of MA embraces a holistic view of employee well-being.

Blue Cross Blue Shield of MA (BCBSMA) addresses the physical, social, emotional, and financial dimensions of healthy living to support and promote holistic health among employees.<sup>77</sup>



- For physical needs, the company offers Wellness Centers for yoga, meditation, and exercise, as well as walking stations, outdoor trails, health food offerings, adjustable desks, and more.
- From a social perspective, BCBSMA offers a social media site called "How Do You Live Well," ERGs, community gardens, and healthy snack breaks to bring employees together.
- Emotional assistance ranges from stress management, meditation and yoga classes to resources for children with special needs and flexible work arrangements.
- Financial support includes seminars, spending accounts, and retirement planning, along with gym, acupuncture and massage reimbursements.

**JetBlue's work-from-home policy has decreased overhead and increased profits.**

Jet Blue Airlines has a work-from-home policy for almost all customer service reps and extensive flex for crew members. The company lauds its program for leading to more productive employees and lower overhead that result in lower ticket prices and higher profits.<sup>78</sup>



**Honest Tea embodies flexible work as a core principle of the company.**

Flexible work has been part of the Honest Tea culture since its inception. The company doesn't have a formal policy but instead a relaxed attitude among all employees. The company's director of field marketing said that Honest Tea's embrace of flexible work has helped him collaborate with members of his team that work in a different time zone. Through telework or adjusting his hours, he can bridge the time difference and communicate with them better. The company's VP of Human Resources sums up the benefits of its program this way: "Plenty of employees have come to us and said, 'I couldn't work for any other place because I wouldn't have the flexibility.'"<sup>79</sup>



**Visa established a *Ready to Return* program to attract potential talent.**

Visa piloted a *Ready to Return* program in Silicon Valley to assist and train workers returning to the workforce after an extended period away to raise children or address other needs.



The firm hosted a two-day conference to help valuable talent write resumes, sharpen interview skills, establish their personal brand, and receive executive coaching for their upcoming career search. At the end of the intensive two days, some participants joined the Visa team and others found work elsewhere. Due to the overwhelming positive response to the pilot, Visa is hosting another conference this year.<sup>80</sup>

The Ready to Return program demonstrates an awareness of untapped talent among those who have taken a career side-step to care for family.

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## WHEN FLEX MISSES THE MARK

While the literature makes strong arguments for the benefits employers can derive from flexible work arrangements and its significant value to employees, there remain impediments to success. Some are related to perception and others to more concrete factors like implementation. We explore these challenges here.

### When Workers Fear Real or Perceived Stigma

The concept that workers can be professionally disadvantaged by utilizing flex is well-enough documented that social scientists have given it a name: *the flexibility stigma*.<sup>81</sup> Flex stigma hurts individual employees who are afraid to use flex options as well as employers who are missing out on the organizational benefits they could derive from flex.

People of all ages fear negative repercussions if they utilize flex. They are afraid that they will be seen as less committed and be less likely to receive raises and promotions. In fact, as recently as 2015, McKinsey/LeanIn.Org reported that men and women alike feared taking family leave because it might hurt their position at work, and the overriding reason for this concern was that they worked in a culture that didn't support it.<sup>82</sup>

Other research is consistent with these findings. A recent EY study notes that despite Millennials' clear preference for flexible work, about one in six cite negative consequences like decreased pay or promotion resulting from their use of flex.<sup>83</sup> And a 2014 Council for Economic Advisers report stated that, "One fifth of American adults, and more than one-third of working parents and caregivers...believe they have been denied a promotion, raise, or new job because they need a flexible work schedule."<sup>84</sup>

Critical components to combatting stigma are creation of an authentic flex culture where leaders

actively support and model use of flexible benefits and where valued employees who utilize flex are publicly recognized and rewarded for their accomplishments.

On the legal front, right to request legislation also offers hope. *Right to Request laws* provide a legislative mandate enabling workers to request a flexible or predictable work arrangement to assist with caregiving or other responsibilities and make it illegal for employers to retaliate against employees who make the requests.<sup>85</sup> A handful of states have passed *Right to Request laws*.

### When Employers Offer Informal or Inconsistent Flex Options

Though the data varies, it is safe to say that more than 60 percent of U.S. companies offer informal flex programs without written policies.<sup>86</sup> While informal programs can work in the right environments, such as smaller organizations and those with cultures of high trust and respect, this approach is generally fraught with potential landmines. Why? Because thoughtful formal programs provide processes to manage flex with parity, transparency, and consistency, and require regular evaluations of how programs are working. Workplaces that lack these protocols are more likely to wind up with flex structures that are misused or misunderstood. In the worst cases, employers can find themselves having to roll back the flexible options,<sup>87</sup> creating even more disruption and dissatisfaction when doing so.

To avoid these potential pitfalls, readers should review our recommendations for organizations found on page 22.

## When Frontline Managers Aren't On Board

The greatest resisters to flex can come from mid-level supervisors. Why? For starters, they might be the employees who are arriving at work at the same time every day and feeling daily pressure to deliver results. Someone with a set workday schedule might resent those working from home or coming and going at different times.

A frontline manager who is overworked or short-staffed might shortsightedly view the organization's flexible schedules as a hindrance.<sup>88</sup> And managers who lack knowledge and training might not know how to communicate with teams about flex or subscribe to the outmoded notion of the "ideal worker"<sup>89</sup> who can work full-time without family conflict (usually due to a spouse at home).

Managers should be knowledgeable about the reasons people need flexible options and ensure that their remote workers aren't feeling pressured to work longer hours. Do they know that compressed workweeks are associated with health risks because increased hours per day can create physical and mental strain<sup>90</sup> and that it is common for remote workers to feel they always have to be available for work?

Frontline managers need education and training to understand the extensive benefits of flex as well as how to communicate with and manage workers who

use flex. Success will come when they are properly empowered, they view flex as the valuable business tool it is, and perhaps even use flex to improve their own work-life situation.

## When Organizations Don't Measure Results

Most employers do not track the benefits of flex, despite the returns it provides for the bottom line, corporate culture, and employee health and well-being. FlexJobs CEO Sara Sutton Fell notes that while about 80 percent of U.S. businesses offer some form of work flexibility, only 3 percent track return on investment (ROI). She says that it "...highlights a massive problem with why employers aren't adopting work flexibility more readily."<sup>91</sup>

The fear that workplace flex will be too expensive can be a significant deterrent for employers, especially smaller ones. Since the data shows that businesses offering flex see lower rates of absenteeism and turnover,<sup>92</sup> ultimately resulting in lower costs, tracking ROI would eliminate the assumption or fear that flexible options are too costly.

Employers that don't track results are regrettably hurting themselves and their employees, putting their flexible offerings in jeopardy of being rolled back for the wrong reasons. Businesses should have metrics in place to gauge return on investment and provide concrete data to support the case for flex.



Source: [www.dilbert.com](http://www.dilbert.com)



## When Companies Roll Back Flex

We would be remiss if we didn't note the controversies that have arisen in recent years when some high-profile employers have scaled back their flexible options. Marissa Mayer's 2013 decision to roll back remote work at Yahoo probably generated the most attention, but major employers like Bank of America, IBM, and Aetna also found themselves in the spotlight when they reduced their workplace flex offerings. The key question is whether these moves represent a permanent change in the landscape – a trend that will gain momentum. Both public commentary on these actions and hard evidence – the continuing growth in flex use and its appeal among all workers – suggest that these are independent decisions that will not usher in a decline in flexible work arrangements.

Why have these major corporations reduced flexible options? These firms are struggling to compete on innovation with small, nimble companies and as HR

consultant Thanh Nguyen says, “...they're thinking of every single possible way to reunite people to drive better innovations.”<sup>93</sup> The irony is that the startups these legacy firms compete with have cultures that embody the notion of flex options like telecommuting.

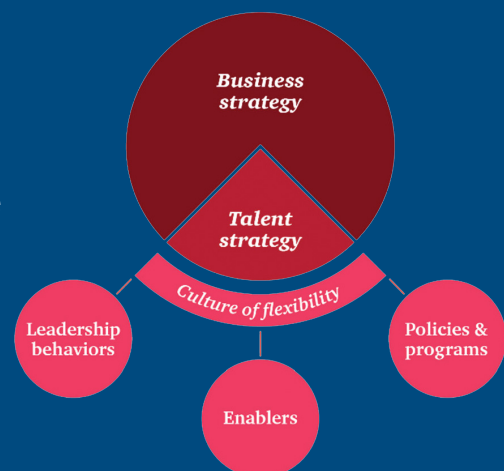
The underlying rationale behind the rollbacks is increased collaboration, but critics question the logic. They note that if co-location were necessary for collaboration, companies would never locate employees in different buildings, as a preponderance of major organizations with national and global employees do. They argue that, instead of depriving workers of flex, employers should focus on open communication, autonomy, and trust. An Inc. Magazine article concludes, “Collaboration (and innovation!) is rooted in trust no matter where the work gets done. Give your people the right guardrails to work within plus the autonomy to make decisions, and they'll perform well...Make no mistake: remote work is here to stay.”<sup>94</sup>

## Flex at Work: PwC - Creating a Culture of Flexibility

PwC's recommended approach to developing a flexible culture is sophisticated and methodical. They describe a culture of flexibility as one output of the organization's talent strategy based on three primary components: leadership behaviors, systems and processes enablers, and policies and programs.<sup>95</sup>

- Leaders must model the policies and encourage their teams to do the same.
- Systems and processes must be in place to support flexibility; they include technology systems, real estate and office space, and strategic approaches to talent that accommodate flexibility.
- Policies and programs, which can vary widely and be formal or informal depending on the organization, should include many kinds of flexible benefits, flexible time, and flexibility around place of work.

The more closely these three components are aligned with the organization's business and talent strategies, the stronger the culture of flexibility.



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## RECOMMENDATIONS FOR ORGANIZATIONS IMPLEMENTING FLEX

If you have looked at the Success Stories found on pages 13-18, you can see that organizations take a variety of different approaches to flexible programs depending on their industry, size, employee demographics, available resources, and other factors. The practical recommendations below are derived from the best practices found in the literature. You can easily pick, choose and adapt the strategies and tips that might work best for your organization's needs.<sup>96</sup>

### Step 1: Conduct a Self-Assessment

Begin with a self-assessment of your culture, current practices, and employee needs. A thorough assessment will do more than prepare you to move forward, it will create an internal benchmark for you to measure success against.

- Honor where your firm falls on the flexibility spectrum illustrated on page 13.
  - Stage 1-Are you currently making individual accommodations without any formal policies?
  - Stage 2-Do you offer programs but only in pockets of your organization?
  - Stage 3-Have you instituted a variety of different plans to meet needs?
  - Stage 4-Are you already utilizing flexibility as part of your culture to achieve business goals?
- Explore the following:
  - Does your culture currently support flexibility and if not, why? Is there a culture of trust? What do you need to do to get there?
  - What do your employees say they need? Conduct engagement surveys, hold focus groups, and meet one-on-one with employees to assess their views.

- What will it take for you to begin focusing on results rather than face time?
- If flex is already utilized, how is it working and what needs to change?
- Gather data on productivity, absenteeism, recruitment, and retention, looking at how all are linked to flexibility.
- Utilize exit interviews to get honest feedback.

### Step 2: Develop Broad Goals

Establish long and short-term goals for your flexibility program that align with your overall business strategy. Address the following:

- What is HR's role?
- What is senior leadership's role?
- What baseline policies and legal issues should you consider?
- Which employees can participate and to what extent? (Equity, not equality.)
- Do you need new mechanisms for employees to apply for or request flex?
- What do managers need to learn and how do you support them?
- How are you going to resolve problems and challenges related to implementation?
- Are there unique options you can provide based on your culture, your industry, or your employee base? (Think of Ikea's decision to support its Dreamers.)
- How do you address the unique needs of your underrepresented employees? Think about diversity in all of its forms, such as different family structures, the gender factor, or employees with disabilities.
- What specific options do you want to provide?
- What is your timetable for implementation?

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### Step 3: Implement Your Program

- Develop specific flexible initiatives that will work for your organization and employees.
- Establish pilot programs in pockets of your organization and for set periods of time to minimize risk.
- To the extent possible, make sure all employees have equal access to flex programs and policies.
- Communicate the new options clearly and broadly so that all employees, not just some, are aware of the offerings.
  - Make clear the business case and benefits to employees.
  - Provide a handbook that outlines specific flex options and how to utilize them.
- Have senior leaders model flex by visibly using it and discussing its personal benefits.
- Educate, train, and incentivize supervisors so they are empowered to support and manage flexible work. Frontline managers often need the most support. Share tips like this with them: “Don’t ask why a person is seeking flex but whether the work can be done effectively.”
- Be sure you are focusing on organizational results as a measure of success rather than face time. This helps empower employees and reduce flex stigma.
- Help employees understand the difference between equity and equality. Equity means that workers have access to flex options based on their specific job requirements. Equality means all workers get the exact same level of access to all options regardless of their role, which can backfire. For instance, certain positions such as customer-facing roles in retail might not support remote work.
- Develop team-specific plans to manage flex that include:
  - Official request forms or processes to request flextime
  - How work gets done and how joint projects are handled
  - How to maximize transparency about flex and communication among coworkers
  - How much time employees will spend in the office
  - Certain days designated for the entire team to be together
  - Technical support changes to accommodate flex; remote workers need access to laptops, documented security, phone use, and high-tech tools like GoToMeeting, Skype, or Google Hangout
  - How to discuss performance in the context of flex, making sure it is decoupled from performance and promotion opportunities
  - How to avoid pressure to work extra hours or be “connected” all the time and how to ensure that people who work part-time are not given full-time work loads
  - Invest in programs and tools that support a culture of flex and program success. This might include implementing the right technology for employees working remotely, employee assistance programs for all employees, wellness programs, and even support networks for fathers.

- 
- Hold live and virtual forums that feature flex success and concerns. For example:
    - Position flex as an accomplishment for employees, making it a right rather than a benefit.
    - Promote employees who are utilizing flex and highlight their success.
    - Request that leaders discuss their own use of flex.
    - Address perceptions of unfairness.
    - Encourage and respond to feedback.

#### Step 4: Measure Your Results and Monitor Success

- Develop a measurement plan, monitor progress, and make necessary adjustments as you move forward.
- Go back to some of the tactics you utilized in Step 1 to assess your culture, programs, and processes to determine how you are doing.
  - Have you moved along on the maturity spectrum?
  - Is your culture supporting flexibility?
  - Are you staying focused on results?
  - What do employees think?
  - What needs to change?
- Conduct regular surveys, focus groups and interviews to gather management and employee views about what's working and what's not, making adjustments as necessary.
  - Be sure that managers are checking in regularly with employees and that they understand how flexibility is impacting entire teams.

- Utilize exit interviews to get accurate feedback.
- Continue to gather data on satisfaction, productivity, absenteeism, recruitment, and retention, looking at how all are linked to flexibility.
- Track your success and return on investment so you have concrete data, such as increased productivity and cost savings, to support the case for flex.
- To get an idea of how your offerings compare to other employers' programs, utilize a source such as the online Workflex Assessment offered by the Families and Work Institute.<sup>97</sup> It provides a quick analysis and is self-scoring.

#### Additional resources to help with program development and implementation:

Society for Human Resource Management:  
[www.shrm.org](http://www.shrm.org)

Werk: [www.saywerk.com](http://www.saywerk.com)

Flexjobs: [www.flexjobs.com/employer-blog/creating-an-easy-useful-flexible-work-proposal-form](http://www.flexjobs.com/employer-blog/creating-an-easy-useful-flexible-work-proposal-form)

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## RECOMMENDATIONS FOR EMPLOYEES SEEKING FLEXIBLE WORK OPTIONS

The recommendations below are mostly geared toward employees who work for organizations with few or no formal flex policies, although some of the tips are useful for anyone utilizing flexible work options.<sup>98</sup>

- For starters, be organized in approaching your request. Prepare a formal written request to use along with a personal conversation. The written request should lay out the reason you need a flexible option and as many specific details as possible. It might include your plan for staying in touch with coworkers, solutions to potential challenges, and how you'll monitor and adjust to varying needs (for example, flexing the day you work from home based on client needs).
- Consider piloting your flexible arrangement for a set period of time after which you and your manager can evaluate it and make necessary adjustments.
- Be mindful of the importance of two-way trust and respect, which are both critical to success; neither employer nor employee should make assumptions about flexible work arrangements. Instead, they should discuss them openly.
- Address the impact you believe it will have on your manager and other team members, including people who might report to you, and suggest regular check-in meetings on how your flex approach is working for all involved.
- Encourage your manager to ask questions and provide input, remaining open to feedback. This is especially important advice for women since they often are criticized for resistance to feedback. Here are some questions your manager might need answered.
  - Is your flexible schedule fixed, and how much leeway do you have to alter it?
  - When can you schedule calls and meetings?
  - How can your manager find you when your needed?
  - Is flexible work causing you to work more hours or fewer?
  - Will your flex option mean more work for your manager?
  - What do your team members think about your plan and how will they be impacted?
- Consider creating a scorecard for yourself that addresses your performance related to work goals, communication with the team, or how successful you and others perceive your flex to be. It can answer questions like:
  - What results am I delivering?
  - How reliable am I?
  - Is my work still meaningful and challenging?
  - Am I being stigmatized for utilizing flex?
  - Am I serving as a positive role model for other team members via my use of flex?



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- Find organizational, technical and personal support to help with productivity, efficiency, and day-to-day stress release. These tips are geared mostly toward remote work.
    - Create a designated place in your home or other remote location where you can keep your work and stay organized.
    - To get help in organizing your personal work space, use resources like [workingnaked.com](http://workingnaked.com) or look at recommendations in books such as *There is No Place Like Working from Home*, by Elaine Quinn.
    - Create a personal schedule for the time you are working remotely, being realistic about how much you can accomplish. It's not unusual for people to work longer hours when they work from home.
    - Give yourself breaks from screen time by breaking it up for walks, gym sessions, or coffee breaks.
  - If you work a significant number of “off” hours, an app like SMS Scheduler that lets you schedule texts to go out when you want might be useful.
  - Consider co-working space, which provides organized work areas with the opportunity for social action.
  - Learn from others, especially if you are using co-working space and are surrounded by workers confronting some of the same challenges you are.

**Additional resources to help you maximize use of your flex benefit:**

Flexjobs: [www.flexjobs.com/employer-blog/creating-an-easy-useful-flexible-work-proposal-form](http://www.flexjobs.com/employer-blog/creating-an-easy-useful-flexible-work-proposal-form)

International Virtual Assistants Association: [ivaa.org](http://ivaa.org)

**“Putting flexibility on a cafeteria list of benefits is insufficient to ensure stigma-free access or use of flexible arrangements by employees. To recruit and retain the talented Millennials they seek, employers have to take flexibility to the next step and integrate flex with their business strategy. Transition from an employee-initiated request system into a proactive manager-initiated program supported by tools and technologies.”<sup>99</sup>**

—Kathleen Christensen, Program Director, Alfred P. Sloan Foundation

# GLOSSARY OF WORKPLACE FLEX TERMS

**Baby Boomers:** Born 1946 - 1964 (currently ages 53-70) and comprise 29 percent of the U.S. Labor Force.<sup>100</sup>

**Bereavement leave:** A policy allowing paid time off from work when a family member, relative or friend dies.<sup>101</sup>

**Career lattice:** Moving up, down, or sideways in the company's hierarchy for a variety of reasons. It includes taking positions with more, less, or lateral responsibility while still maintaining a long-term career plan with an employer.<sup>102</sup>

**Compressed workweek:** Alternative scheduling method that allows employees to work a standard workweek of 40 hours over a period of fewer than 5 days in 1 week or 10 days in 2 weeks.<sup>103</sup>

**Coworking spaces:** Membership-based workspaces where diverse groups of freelancers, remote workers, and other independent professionals work together in a shared, communal setting.<sup>104</sup>

**Disability accommodation:** Telecommuting is sometimes requested as a reasonable accommodation under the Americans with Disabilities Act. Employers are not obligated to agree to such an accommodation in all cases, but they are required to engage in the standard give-and-take with respect to a requested accommodation.<sup>105</sup>

**Employee Assistance Programs:** (EAP) Work-based intervention programs designed to identify and assist employees in resolving personal problems (e.g., marital, financial or emotional problems and family issues) that may be negatively affecting the employee's ability to work effectively.<sup>106</sup>

**Employee Resource Groups:** (ERGs) a group of employees in an organization who share distinctive qualities, interests or goals. ERGs' roles have expanded significantly in recent years, aligning more closely with business goals in addition to social concerns.

**Equal Employment Opportunity Commission:** EEO laws enforce laws against discrimination in the workplace including nondiscrimination in wages, hours, and equal access for employees with disabilities.<sup>107</sup>

**The Family and Medical Leave Act:** (FMLA) requires 12 weeks of job-guaranteed leave for organizations with 50 or more employees in a 75-mile radius, to employees who work at least 1,250 hours in the previous year, for maternity, paternity, adoption, and important personal medical needs, including medical caregiving. The law applies to private employers with 50 or more employees. The FMLA allows states to set standards that are more expansive than the federal law, and a number have done so.<sup>108&109</sup>

**Flexible culture:** A culture that authentically supports flexibility by offering accessible options and actively supporting those who utilize them. Major factors that work against such a culture are over-valuation of face time, excessive workloads, fear of backlash, and manager resistance.

**Flexible time:** Employees choosing when they start and finish work.<sup>110</sup>

**Flexible recruitment:** A talent strategy that establishes an effective combination of permanent employees with talented temporary workers. This approach helps organizations perform more nimbly, increasing and decreasing their staffs as needed and reducing the likelihood of layoffs when workloads decline.

**Flexible role:** Employees choosing, within certain guidelines, what they do as part of their job.<sup>111</sup>

**Flexible location:** Employees choosing to work from the office, home, or other locations.<sup>112</sup>

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**Flexibility stigma:** A bias that assumes employees are less than fully committed to work if they avail themselves of flexible work arrangements. Employees experiencing flexibility stigma suffer from negative job and career consequences.<sup>113</sup>

**Flexible Work Arrangement:** (FWA) includes telecommuting, compressed workweeks and flexible scheduling that allows employees to perform their job outside of a company's normal business hours.<sup>114</sup>

**Generation X:** Born 1965 - 1980 (currently ages 37-52) and comprising 34 percent of the U.S. Labor Force.<sup>115</sup>

**Hoteling:** Office spots can be reserved in advance to secure an unassigned desk that is shared with a shifting group of colleagues. Instead of having assigned desks, employees often utilize storage lockers to hold their files and supplies.<sup>116</sup>

**Job carving:** Customizing a position by keeping one or more but not all of the tasks from an original job description.<sup>117</sup>

**Job sharing:** Two employees work together to perform one job. An example might involve Teammate "A" working Monday to Wednesday and Teammate "B" working Wednesday to Friday at the same position, with some handoff and complementary responsibilities on the overlap day.<sup>118</sup>

**Lactation rooms:** An employer-provided location for nursing employees, other than a bathroom, that is shielded from view and free from intrusion. Also called nursing rooms.<sup>119</sup>

**Leave sharing:** Allows employees to donate accrued paid time off (PTO), vacation or sick leave to a general pool. The pool is available to another employee who is experiencing a medical emergency or is affected by major disasters and has already used all paid leave available.<sup>120</sup>

**Millennials:** Also known as "Generation Y." Born 1981 - 1998 (currently ages 19-36) and comprising 34 percent of the U.S. labor force.<sup>121</sup>

**Mommy track:** Refers to a scaled-back or flexible approach to work and career that women with children sometimes utilize. At face value, it facilitates motherhood and eases the work-life balance, but the term takes on a pejorative meaning and represents a form of gender bias when women, without being consulted, are given fewer opportunities for career advancement.

**Negotiated job description:** An individualized job description created by choosing among all the job description requirements performed at the workplace.<sup>122</sup>

**Nursing rooms:** See Lactation rooms.

**Part-time work:** A work schedule that is less than full-time but is normally at least half of the regularly scheduled full-time workweek. Includes schedules such as set three-day work weeks and working 20 hours per week with a different schedule each week.<sup>123&124</sup>

**Phased retirement:** Gradually reducing hours as an employee approaches retirement. Organizations sometimes offer formal phased retirement options.<sup>125</sup>

**Return-to-work programs:** Programs offered to reduce challenges and barriers for employees returning to the workforce after taking an extended period of time away to address family needs. The overall goal is to reinforce to all attendees their value and worth in the workplace, while also supporting them with the tools they need to tackle their next career move.<sup>126</sup>

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**Remote work:** Implies that an employee is working outside of the office. This might be because he or she lives outside of the geographic area of the work location. Remote work does not necessarily imply that employees are “working from home;” it can also mean that they are working at a coffee shop, coworking space, etc.<sup>127</sup>

**Right-to-request laws:** Right-to-request laws attempt to reduce discrimination by providing a legislative mandate enabling workers to request a flexible or predictable work arrangement to assist with caregiving or other responsibilities and by making it illegal for employers to retaliate against employees who make the requests.<sup>128</sup>

**Sabbatical:** A period of paid leave for a worker, usually after working continuously for a set period of work time, during which the employee might rest, travel, volunteer, or study to rejuvenate intellectually, creatively, and personally.<sup>129</sup>

**Sandwich generation:** A generation of adults “sandwiched” between aging parents and raising young children or supporting a grown child.<sup>130</sup>

**Seasonal work:** Employees are able to work less during slower times of the year.<sup>131</sup>

**Shift work:** Traditionally used in manufacturing environments to maximize productivity from fixed resources and costs. Most commonly, shift work is recognized in the service economy, for example supermarkets, computer help desks and technicians.<sup>132</sup>

**Snowbird programs:** Allow employees to transfer to the company's other locations in a warmer region during winter months.<sup>133</sup>

**Telecommuting:** See Telework.

**Telework:** Though often used interchangeably with telecommuting, “telework” is defined as the substitution of technology for travel, while telecommuting is more narrowly defined as the substitution of technology for commuter travel. If someone takes work home after leaving the office it is considered telework but not telecommuting, and if someone works at home instead of driving to an office it is considered telecommuting.<sup>134</sup>

**Tuition assistance:** Also known as tuition reimbursement, this is an employer provided benefit in which an employer pays all or part of an employee's cost to attend college or university classes.<sup>135</sup>

**Virtual work:** See Telework.

**Wellness programs:** Employer offers lower healthcare costs, encourages better habits/routines and provides allotted sick time to stay home when not well. Other perks include discounts, reimbursements for fitness memberships, and on-site wellness centers.<sup>136</sup>

**Work-life balance:** Refers to the proper prioritization between work and personal or home life. The pressure to be connected to work around-the-clock due to technology has made work-life balance a more elusive goal for many. Generation X is often credited with bringing the term into the common lexicon because this generation was the first to send significant numbers of dual-career couples into the workforce.

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