

# Flexible Work Options Accountability Guide

This guide has been developed to help managers and employees with Flexible Work Options (FWO) and provide guidance and tools to help everyone be successful no matter when, where or how you work.

## Why Flexibility Works

Rethinking the way work gets done can help us all respond to the rapidly changing needs of our people and our business.

WorkLife, and specifically FWO's, can have a positive effect on Pearson People's work and personal lives as well as improve engagement & productivity, recruitment & retention, global workforce & customer service, expense reduction & sustainability impact. We have the technology - now let's discuss the facts about flexible work.

## Engagement & Productivity

Those who are engaged are committed, passionate and proud. They are enthusiastic and "in gear", using their talents and effort to make a difference in their company's quest for sustainable business success. Research shows that remote workers can be more productive when they work off-site because they may be better able to focus on their work without interruption.<sup>1</sup> Job sharing or part-time options can retain valued people who need to work a reduced schedule. Flexible hours can boost performance by allowing people to work when they are most productive.

## Recruitment & Retention

People who have flexible schedules and more control over when and where their work gets done tend to be more satisfied with their jobs and take more initiative at work. They are more committed to helping their manager, team and organization succeed.<sup>2</sup> It follows that they would be more likely to recommend the company to others. Flexibility has become a 'must have' for the new generation of workers.

### Did you know?

WorkLife  
Balance has a  
greater impact  
on engagement  
than  
compensation.

*Corporate Executive  
Board*

<sup>1</sup> Corporate Leadership Council ~ Corporate Executive Board 2009

<sup>2</sup> Corporate Executive Board ~ Benefits Roundtable Presentation 2009

## Global Workforce & Customer Service

Flexible hours, part-time schedules and compressed work weeks can provide effective solutions for business areas that need extended service hours for their clients or to work with colleagues in different time zones. Creative use of flexibility can also help to manage fluctuations in work flows due to cyclical business demands.

### Look for these symbols:

Lower Cost



Cut energy



Reduce space



## Expense Reduction & Sustainability

Allowing people to work flexibly can reduce overhead costs and the need for space. When you see the symbols to the right, consider how flexibility can reduce costs, energy usage and office space requirements.

## Flexible Work Options

Can Be	Are Not
<ul style="list-style-type: none"> <li>• Temporary</li> <li>• Long Term</li> <li>• Individual</li> <li>• Team-based</li> <li>• Intermittent</li> <li>• Withdrawn</li> </ul>	<ul style="list-style-type: none"> <li>• Guaranteed</li> <li>• An entitlement</li> <li>• A reward</li> <li>• Permanent</li> <li>• Contractual</li> <li>• Suitable for all situations</li> </ul>

*When managers say 'YES' to flexibility and individuals are accountable...the whole team, the company and the environment win.*

## How Flexibility Works

*Have a doctor appointment?*

Plan ahead and flex schedules for the week to make up the time.

*School event to attend?*

Flex schedules to get work accomplished and attend the event.

*Running out of office space for your team?*

Combine remote work with office sharing to make it work short or longer term.

### Informal/Occasional Flexibility

Lots of people do not want to use a formal flexible work arrangement; however, there are occasions when they may need flexibility to take care of periodic personal issues. Managers are encouraged to grant informal flexibility requests if business needs can be met. Get creative about how to get the work done as well as allow people to be effective outside of work without always using paid time off like personal and vacation days.

### Formal Flexibility

Flextime allows varied start and end times for the workday if business conditions permit. People are still expected to work the total number of scheduled hours per day and should be available during 'core hours' agreed upon in the department. Core hours make it easier to schedule meetings when everyone will be available. Managers may implement flexible schedules on a case-by case or group basis within their department.

Benefits:  

- Accommodates extended coverage hours within a department
- Decreases commuting times and gas consumption with people traveling when traffic is minimal

### Reduced Time Schedule

Some full-time people may wish to explore reducing their schedules due to a change in life situation. For example, returning to work after a leave of absence, pursuing continuing education or looking after an aging relative. There may also be instances when business demands change and it is time to transition a full-time position to a reduced schedule.

Benefits:   

- Reduces commuting expense and energy
- Allows office space sharing
- Retains people who cannot continue to work full-time
- Enables gradual work reduction prior to retirement

Whatever the reason, there are some important things to consider when looking at this option. First, it is a good fit for the

individual and the department? Also, benefits may be affected by a reduced schedule so make sure to check with Human Resources (HR) for issues related to this change of status.

## Compressed Schedule

A compressed schedule is a standard number of hours that is accomplished in less than five days in a week or 10 days over two weeks. This form of flexibility is widely used for Pearson's 'summer hours' program and can be adopted to manage regular peaks and valleys in a department's workload.

Benefits:   

- Allows for longer work hours on certain days helping to extend department coverage
- Enables office space sharing on the days the person does not work
- Eliminates some commuting and reduces footprint

Please note that this FWO is most appropriate for people who are non-exempt or hourly. Please work with HR to mitigate any unexpected overtime that could occur with this type of schedule.

## Remote Work

With this form of flexible work, employees generally remain full-time but work at home or another location for one or more days each week. Certain positions are better suited to remote work. For example, jobs focused around projects, technology and independent work may be a good match for this option. On the other hand, jobs requiring daily face-to-face interaction, phone or reception duties, on-site resources or shared reference material may not be.

Benefits:   

- Reduced overhead can be achieved in some cases
- Helps with business continuity in the event that the building is inaccessible or quarantined
- Allows for the recruiting of those who are geographically remote or physically challenged
- Benefits the environment with reduced commuting

Policies regarding overtime and paid time off for remote workers are the same as for those who work in the office. Time reporting is very important for non-exempt workers regardless of where they work.

## Can Flexibility Work?

### One Department: Many Flexible Work Options

Here is an example of a real unit at Pearson that is making it work with all these different FWO's:

- *Flextime:* 💰 One member of the team comes in very early and leaves early to extend hours of coverage in the department. Another comes in later and leaves later to avoid a heavy commute and also extends coverage at the end of the day.
- *Reduced Time Schedule:* 🕒 Two people share the job of supporting a senior manager. One works 3 days and the other 2 days each week.
- *Compressed Work Week:* 💰🕒 Two people work compressed workweeks. One works FT hours in 4 days and is off Thursdays. The other is off Fridays. One is motivated by an eldercare issue and the other is childcare related.
- *Remote Work:* 💰🏠🕒 Several people work remotely 1 or 2 days per week. Their offices provide shared space for visitors and/or consultants. One person worked from home while recovering from a health issue while another works remotely full-time due to a spouse's relocation.
- *Flexplace:* 💰 One member of the department worked for several months at a different Pearson site while her husband was receiving cancer treatments in that city.

The department benefits from extended hours of coverage, office space savings/sharing and talent retention. The individuals are better able to manage their work & life effectiveness. The environment wins when commutes are eliminated and we need less office space.

**Case in Point:**

Pearson Shared Operations implemented a remote work program a few years ago.

Here is a sample of comments collected from participants:

*"This program has become a great incentive for me to strive and do a better job every day."*

*"I have been working from home almost two years, and have been extremely productive. I have continued to become more efficient and taken on more responsibilities. My co-workers in Old Tappan and I are in contact often, and there is no hesitation on either part to reach out when necessary."*

*"Working at home allows me to get a lot more done than a regular day in the office."*

What are the manager's saying?

*"We are keeping collaboration high by using IM, Web Cams and Webex for sharing ideas and documents."*

*"There is no real change in the group but there is a sense that everyone is more focused. People are more 'fresh' to start work when they eliminate a long commute."*

*"People seem happier...and happy employees are productive."*

**"87% of employees and 70% of managers reported that working a flexible arrangement had a positive or very positive impact on productivity."**

*Sloan Work and Family Research Network*

## Making Flexibility Work

Flexibility is a tool that we can use to respond effectively to the changing needs of our customers as well as how we meet those needs. Whether you are proposing or being asked to approve an FWO, you should consider the following:

### Proposing a Flexible Work Option

- Assess the individual situation. How would a particular flexible work option fit into short- and long-term goals? If remote work is being considered, is there appropriate work space? Is the right equipment available?
- Prepare a 60 to 90 day pilot proposal using the FWO Proposal Worksheet considering the potential benefits and challenges. Consider the nature of the work & business requirements. Focus on understanding the effects the arrangement will have on the business and on specific individuals and groups.
- Set up a meeting to discuss. Listen with an open mind. Explore ways to make it work – don't make assumptions. Challenge views of how the workplace should operate. Do not focus on the reason the FWO is being proposed. Discuss the request with internal & external customers and co-workers.
- Be open to discussing requests for flexibility and consider all alternatives, not just the one initially proposed. If the initial proposal does not meet business needs, discuss what modifications might result in an acceptable solution. Create a proposal that addresses the business needs including those of the manager and co-workers.

### Succeeding with a Flexible Work Option

- Focus on workflow, productivity and the nature of work that needs to be done rather than quantity of hours worked, hours on site and management by sight.
- Clarify expectations of all parties up front and continue to communicate to everyone! See the Communications Checklist at the back of this guide.
- Maintain an atmosphere of mutual trust and respect.
- FWO participants must be flexible about flexibility. If there is an important meeting to attend, a problem that needs addressing or a change in business needs it may be necessary to come to the office on a 'remote work' day or for flex hours to change.

### Evaluating a Flexible Work Option

- Develop criteria at the outset that can be used to evaluate the success of the arrangement. (i.e. productivity levels, objectives, outcomes, 'reachable' hours, etc)
- Set a date for formally evaluating the arrangement using the agreed upon criteria.
- Establish a process for addressing concerns as they arise during the length of the arrangement.
- Performance should be monitored on an ongoing basis regardless of where and when work gets accomplished. Performance problems should be addressed without regard to a flexible work arrangement when possible. If improvement is not attained within a reasonable timeframe it may be necessary to re-evaluate any FWO.

## Ending a Flexible Work Option

- Flexible Work Options are not tied to a position or person forever. If business and/or personal needs change, the arrangement may be modified or ended. In certain situations, a waiting period may be required until it is possible to return to a previous work schedule or location.
- If the arrangement is not meeting the business needs, work together to consider other flexible options. Think about informal as well as formal flexibility.
  - Discuss what would need to change to make an arrangement work
  - If results do not change, it may be time to return to a more traditional work schedule or location

**Flexibility + Accountability = Results**

**Employees and Managers both need to work on communicating well.**

**Mutual trust and respect is critical.**

**Flexibility from company needs to be balanced with flexibility from employee.**

**Remain flexible with flexibility.**

**Be creative!**

**Why Flex?** As the business environment changes, it's important to redefine the role of flexible work. Reflecting on our current understanding of flexibility, the best companies now realize that:

- The need for flexibility is an issue for everyone
- Flexibility is not a one-size-fits-all program, but a process-based strategy that can accommodate the unique realities of each person and business
- Flexibility is about retaining talent, saving money, global client service, sustainability and much more.
- Flexibility is more than a perk...it's about the way work is done and life is managed.

*Lessons Learned From 25 years of Workplace Flexibility  
By Working Mother media & IBM 2010*

## Flex Tool - Communication Audit

When arranging flexible work, it's important to determine when, where and how the flex worker will be available to his or her supervisor, coworkers and customers (internal and external). Not all of the questions below apply to every work situation. Address the ones that are most applicable to related job responsibilities.

### General

When not in the office, how will the individual communicate? When will the flex worker be available for calls—which days, what hours? Are there specific hours when he or she must be available? Have others been informed on how and when to reach the individual? Will IM, Webex, or a sharing site be used when part of the team is remote?

### Customers (Internal or External)

Before implementing an FWO, the impact on customers must be fully considered. How will customers reach a flex worker?

### Messages

Where can messages be left? Voice mail; cell phone; an individual who can take messages for you; or a back-up partner? Think about limiting the number of places messages will be left as well as the possible confusion caused from too many phone numbers.

### Meetings

On non-working or remote work days there may be a need to be available for meetings in person. What contingency plans are in place in the event there is short notice for a meeting? Is there agreement on when staff meetings and one-on-one meetings will take place?

### Information

Have you informed people about where critical information is kept?

- Filing system
- Computer access
- Keys to files, desks and office
- Addresses and contact information
- Calendar

Are necessary computer files shared with others who might need to access them? How will information be accessed if working remotely?

### Receiving Feedback

Encourage your supervisor/manager, coworkers, customers and others to give you feedback on how the new work schedule is working for them. Check in regularly and make sure nothing is falling between the cracks. Be proactive about seeking feedback.

### Flex Tool – Flexible Competencies

In addition to job specific and technical skills, these competencies may help remote workers be successful.

Competency	Behaviors
<b>Communicates Effectively</b>	<p>Expresses oneself effectively in one-on-one conversations and small groups as well as when using e-mail, Neo, IM, Webex etc.</p> <p>Listens carefully and attentively to others' opinions and ideas.</p> <p>Shares information and viewpoints openly and directly with others.</p> <p>Provides clear and detailed information to others.</p>
<b>Readily Adapts</b>	<p>Works productively in the face of ambiguity or uncertainty.</p> <p>Deals constructively with mistakes and setbacks.</p> <p>Readily adapts to different ways of doing things.</p> <p>Seeks opportunities to acquire new knowledge and skills.</p> <p>Accepts feedback openly, without becoming defensive.</p>
<b>Demonstrates Credibility</b>	<p>Acts consistently within stated policies and practices.</p> <p>Does not cover up or blame others for problems or mistakes.</p> <p>Protects confidential information.</p> <p>Follows through on commitments.</p>
<b>Shows Initiative</b>	<p>Identifies what needs to be done and does it.</p> <p>Does not easily give up in the face of unexpected obstacles.</p> <p>Maintains a consistent, high level of productivity.</p> <p>Takes personal responsibility to make decisions and take action.</p>
<b>Establishes Plans</b>	<p>Coordinates planning efforts with others.</p> <p>Identifies action steps needed to accomplish objectives.</p> <p>Identifies resources needed to accomplish objectives.</p> <p>Establishes realistic plans and work schedules.</p>

**SAMPLE:**  
**FLEXIBLE WORK OPTION**  
**Proposal Worksheet**

Name:

Position:

Hire Date:

**1. Basis for this proposal**

After careful evaluation I submit this proposal as a request for:

- |  |  |
|--|--|
| <input type="checkbox"/> Flextime                          | <input type="checkbox"/> Part-time* <i>*may affect employee benefits</i> |
| <input type="checkbox"/> Compressed Work Week <sup>1</sup> | <input type="checkbox"/> Job Sharing*                                    |
| <input type="checkbox"/> Telecommuting                     | <input type="checkbox"/> Flex Location (a different Pearson facility)    |

Detail/notes:

**2. Overview of Requested Work Arrangements**

I am requesting that I be permitted to alter my current work schedule (hours, status):

from: \_\_\_\_\_ to: \_\_\_\_\_

I would like to begin the above arrangement on (date)  
and suggest the initial trial period end on (date)

**3. The Potential Advantages:**

**4. The possible drawback(s) of my request are:**

**5. Impact on work results and solutions:**

***Please note: The Company remains free to change, reduce or eliminate in whole or part, any of this program without notice, without having to consult anyone, and without anyone's agreement. Flexible Work Arrangements will be granted based on the employee's performance, job responsibilities, technology and departmental needs.***

Manager Approval: \_\_\_\_\_ HR Approval: \_\_\_\_\_

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References Include:

- What Really Works: Lessons Learned from 25 Years of Workplace Flexibility, *Working Mother Media & IBM 2010*.
- Families & Work Institute, 2009: *When Work Works* by Ellen Galinsky, Erin Brownfield, Lois Backon, and Dana Friedman.
- 2009 Guide to Bold New Ideas for Making Work Work
- Center for Future Studies: Remote Managers Toolkit
- US Department of Labor: Flex-Options Project
- World at Work: Telework Trendlines 2009
- Corporate Leadership Council & Benefits Roundtable Research & Presentations

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