Workflex and Small Business Guide

Big Ideas for Any Size

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WHEN
WORK
WORKS

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Workflex and Small Business Guide: Big Ideas for Any Size
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Introduction

> *Workflex[1] is a nice idea, but it's not for us. Only big companies with large workforces and lots of resources can be very flexible. We need all hands on deck all the time if we are going to survive and grow.*

Sound familiar? The idea that small organizations have special constraints that make workplace flexibility and other forms of work-life fit support difficult or impossible is not new. Simultaneously, small organizations are renowned as sources of innovation and opportunities to construct work styles that defy the norms of larger organizations and set examples bigger organizations are eager to duplicate. So, which is it? Are small businesses just unable to incorporate workflex into their business strategy or are they the source of workflex innovation?

The truth is that small organizations are amazing sources of creativity and reinvention because they have size related constraints on what they can do to support their employees. The tension between big goals and small resources is the source of a lot of the greatness that has emerged from small organizations as circumstances force them to think differently and find more efficient solutions to organizational challenges than their larger competitors.

Workflex is no different, and small organizations are in an unparalleled position to be leaders in the quest for pairing organizational effectiveness and employee sustainability into new and more advanced forms. In fact, despite a common narrative that small organizations can't do workflex as well as larger organizations, data from Families and Work Institute's (FWI) National Study of Employers (NSE) — an ongoing nationally representative study of employers of 50 or more employees and the most comprehensive examination of workplace flexibility in the U.S. — have regularly shown that small organizations have been leading the way over the past decade!

In the **2005 NSE**, small employers (50-99 employees) were more likely to provide flexibility than large employers (1,000 or more employees) in about half of the types of flexibility investigated. This difference disappeared in the **2008 NSE** when the recent recession was in full swing. This process had begun to reverse itself in the **2012 NSE** and, by the **2014 NSE**,[2] small employers are once again more likely than large employers to:

- allow employees to change starting and quitting times within some range of hours (33% small and 20% large employers);

- work some regular paid hours at home occasionally (11% small and 4% large employers);

- have control over when to take breaks (66% small and 52% large employers);

- return to work gradually after childbirth or adoption (53% small and 37% large employers); and

- take time off during the workday to attend to important family or personal needs without loss of pay (52% small and 36% large employers).

In fact, across 18 different workflex policies measured by the NSE, there is no form of flexibility that is more commonly offered by large employers.

For more small organizations to be providing workflex than their larger counterparts, it requires that they approach workflex solutions in different ways, playing to the strengths of their cultures and work processes rather than seeking to emulate the methods used by larger companies. For example, many smaller businesses invest less in formal work policies and focus on their culture to guide their actions and shape how they treat one another and structure their work. This is why much of the advice in this Guide is a call to invest in stronger, more productive cultures as well as formal policies and procedures in order to stay lean and flexible.

What is workflex in small organizations?

Conceptually, workplace flexibility or workflex that works for both the employer and the employees is the same for any number of employees: a dynamic partnership between employers and employees that defines how, when and where work gets done in ways that work for all (employers, employees, families, clients and communities). Workflex is not merely a benefit, a form of compensation or punishment, or a collection of specific programs or policies. Unlike these standard organizational carrots and sticks, workflex is not something an organization does for or to employees, but rather is best accomplished *with* employees. The results of this process can look very different between industries and even among specific organizations in the same industry. For workflex to be maximally effective, it must respond to the unique combination of products and services, organization strategies, federal and local employment laws, and employees present at a specific organization or worksite. This means that no two organizations are alike, and best practices in one organization may not make sense in another. Similarly, specific policies like telework or shift scheduling may or may not work for any specific organization or team. Even when two organizations have the same programs, they may bear little resemblance to one another when they are enacted, even if they achieve the same great results for each. But, as small business leaders, being on the cutting edge and finding your own way to make things work is not new and is probably one of the reasons why you are at a small business in the first place.
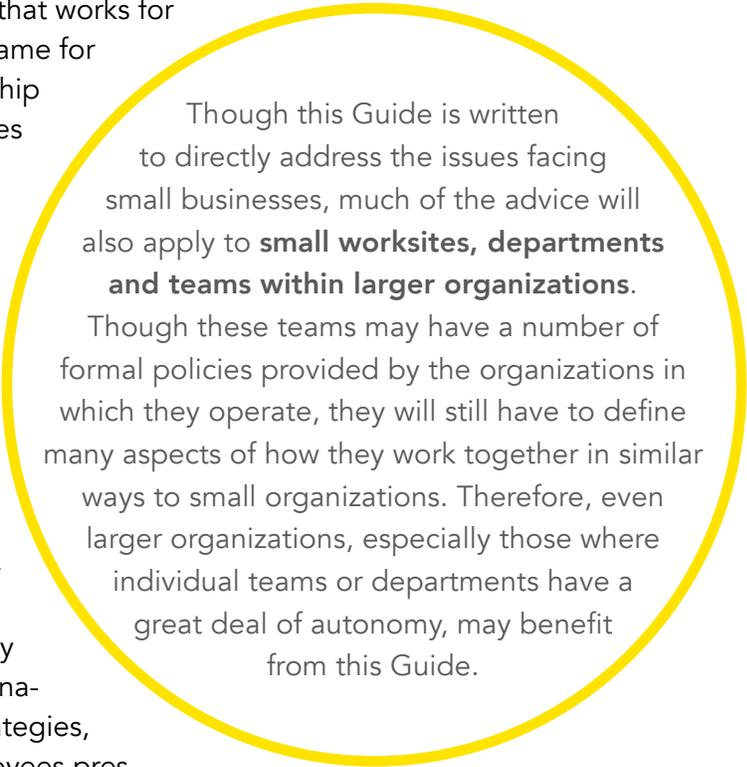
Though this Guide is written to directly address the issues facing small businesses, much of the advice will also apply to **small worksites, departments and teams within larger organizations**. Though these teams may have a number of formal policies provided by the organizations in which they operate, they will still have to define many aspects of how they work together in similar ways to small organizations. Therefore, even larger organizations, especially those where individual teams or departments have a great deal of autonomy, may benefit from this Guide.

As a small business leader, you have fewer employees to fill in for one another, but you also have fewer employees to coordinate. You likely have less formal bureaucracy to realign when

workflex opportunities present themselves, and employees are probably closer to one another and business strategy than at larger organizations. This makes everyone a potential source of innovation, not just in your products and services, but also in your work processes and culture. You can invite other employees to offer their ideas not just on what they want, but on how it can be done. For many small business employees, work is not just a job, but a chance to make something great. You can engage that energy and commitment to enhance success for you, your staff and clients/customers both on and off the job.

The methods and examples highlighted in this Guide are not prescriptions for your organization. They are inspirations for reinventing your organization's approach to work in general and workflex in specific, so you can encourage the creative solutions and dedication that are already making your organization great.

How does workflex benefit small organizations?

There are a number of ways in which workflex supports organizational effectiveness. From reduced absenteeism to lower real estate costs, to reduced turnover and increased productivity,[3] well-implemented workflex programs have been shown to provide value for organizations in general. Furthermore, workflex has additional benefits for smaller organizations. Here are a few examples:

- Small organizations that seek to become large organizations have to match their acquisition of real estate to their growth. Flexibility options, like telework, allow small organizations more options for choosing when to grow their footprint without having to limit the growth of their organization.

- Small organizations have fewer people who need to be trained or guided through change procedures or updated on day-to-day adjustments. Fewer people generally mean less need for formal systems to document many aspects of work procedures and less bureaucracy to manage those procedures. When both the people and the system are flexible, it is much easier to invent, implement and maintain dynamic work processes.

CASE STUDY:

Architecture Technology Corporation (ATCorp)

A software development company with about 100 primarily male and millennial employees sought to reduce turnover. They asked employees what they wanted most, and were told it was schedule flexibility. The company instituted a "40 and 5" structure where employees can work any combination of 40 hours over five days. Due to security clearance issues, employees must work onsite and must go to the office every day they do not take Paid Time Off (PTO), but are not required to work any specific days or hours on each day.

Employees have been ecstatic to have such flexibility even after traditional PTO options were reduced. Since introducing their flexible schedules, employee retention has doubled from the local industry average of about two years.

(See Appendix 1 for a copy of ATCorp's flexibility and PTO policies.)

- Even the best workplace will experience a disruption in staffing (e.g., your most critical employee has a health issue, gets a different job or wins the lottery). Workflex systems can be used to carry your organization through the disruption more smoothly than if you had to figure out on the fly what to do without that employee.

- Small organizations can't always offer top-notch salaries, benefits and perks to top-notch staff. However, today people are choosing jobs based on a variety of characteristics and greater flexibility, and influence on their organization can make a small organization a more attractive place to work for high-performing employees.

- Small organizations don't always have the resources to open up new locations wherever a business opportunity exists. Remote employees can expand an organization's reach into new areas without having to acquire additional space for a local office.

How can workflex challenge small organizations?

Despite the ways in which workflex can provide small organizations new opportunities, it does not come without some hard questions. Some of the challenges to workflex in small organizations are not unique to small organizations and are addressed in other When Work Works **Workflex Guides** (e.g., how to manage **telework** or employees tied to specific workplaces such as in **manufacturing**). On the other hand, there are a few challenges to workflex that are of particular concern for small organizations. The following comments exemplify how these challenges might be mentioned by leaders and managers in your organization:

- We have a small staff, so who will do the work when an employee is unavailable?

- That employee has unique and absolutely critical skills; we can't afford for him/her to be unavailable.

- Who is going to manage this program? We are already all so busy, and we don't have an HR department.

> **CASE STUDY:**
>
> **Dade Moeller**
>
> Dade Moeller has four offices (Washington, Maryland, Nevada and Tennessee) and employees working in 15 different states. Allowing employees to work remotely allows them to hire the best and the brightest without having to pay costly relocation expenses or ask employees to leave their communities. Plus, the company saves on the overhead expenses associated with maintaining offices in multiple locations for only a handful of employees. To build a sense of community among their dispersed employees, the company encourages employees within each region to come together for year-end and other celebrations, so they feel like part of the larger organization. All employees are welcome at Dade Moeller's corporate headquarters where they maintain turnaround offices for their use.

- We don't have the resources to spare on buying special equipment or paying for temps.

- The founder/president/central leader believes in "all hands on deck," and there is no one with the authority to try anything different.

These comments boil down to three big questions. How can you …

- … leverage a small staff for more flexibility?

- … pursue workflex with limited resources?

- … persuade highly influential leaders to give workflex a chance?

The rest of the Guide provides some tips on how to address these three major considerations for small employers working on integrating more workflex into their business strategies.

How can organizations leverage a small staff for more flexibility?

As you know, small businesses succeed not only because they do good work using the right policies, but also because they have the right culture to bring out the most in small teams of engaged employees. The following workflex inspirations build off that reality and suggest changes to both policy and culture to make workflex a reality for your organization.

- **Cross-train employees on job tasks.** In a lot of small organizations, employees have broad responsibilities covering multiple roles that an organization needs to function. So, broad skill sets are a norm in small businesses. However, these broad skill sets tend to emerge organically in response to problems and often result in "indispensable" keystone employees whom organizations tend to lean on heavily. Keystone employees are both an asset — because they can do so much — and a liability — if they are unavailable for any reason, work is hampered or halted. Keystone employees can also become overburdened by the number of responsibilities that accrue to them over time, potentially causing burnout that results in turnover or bad behavior from keystone employees who resent the inequity in their roles compared with their peers.

  Instead of unintentionally creating a few keystone employees, proactively foster a bunch of adaptable employees who are trained in a variety of tasks. When one employee begins to become the "expert" in a critical task (in other words, you or other leaders start feeling like they are "indispensable"), that employee should become a trainer. Trainers have a few of their minor tasks temporarily reassigned to other employees who can do those tasks well. The expert then uses that freed time to train two other people in the critical task. Make sure to readjust the work distribution once the training period is over and give the employees who help the trainer find time to teach others

> ### CASE STUDY:
>
> #### IHire
>
> An online job site with about 35 employees with a results-focused work environment had a period where the marketing department was short staffed. Rather than outsource the work, they involved employees in other departments in the marketing process, training and developing existing staff to do the work.
>
> The cross-training effort enabled them to fulfill organizational goals and gather unique insights from employees who would not normally be able to participate in marketing efforts.

opportunities to learn next. You can also have the newly trained backup employees take turns training others until the skill is more broadly known throughout the organization.

While this may seem like extra work at first, it will provide employees with leadership and mentoring experience and more flexibility (for the employees and the organization) when that skill is in high demand. Remember to emphasize the importance of this process when an employee benefits from having a backup. It is also worthwhile to frequently mention that indispensable employees are a vulnerability — not an asset — so employees don't resist sharing their "trade secrets" with others.

- **Emphasize regular and consistent updates on strategy, work progress and client relations.** It would seem that in a small organization communication would be easy. There are fewer people, often sitting right next to each other; thus, knowledge about what people are doing should just naturally diffuse from one person to the next. Yet, real communication — the kind that allows for innovation and collaboration — can't be assumed to happen organically. Your staff needs to know more than just *what* their neighbor is doing. They need to know *why* they are doing those things in order to be able to make suggestions for improvement and to prioritize work tasks.

  The same goes for workflex. Employees often have a wide range of tasks, and when they are unavailable, some of those tasks may not get done. However, not all of those tasks are equally important. Some can wait until the employee gets back, while others need to be done immediately to keep the business afloat. To be effective, good workflex strategies need to integrate both what employees do and why they do it. Take vacations as an example. Employees might be able to get some more vacation time or freedom in scheduling vacation if you can identify busy and slow seasons and match vacations to those periods. When an employee is on vacation, you can determine whether or not to interrupt that vacation if you know whether the client calling can wait for an answer. Better yet, if you know where the vacationing employee's files are stored, you can provide the answer without interrupting a great vacation.

  Make sure that briefings on projects happen on a regular basis, not just before someone runs out of the office to attend to an emergency. In general, two to four times a month is a good rule of thumb. Depending on how often things change in your business, you may require updates more or less frequently.

  When planning workflex — especially workflex that involves multiple days of off-hours (e.g., vacation) — make sure employees using workflex answer the following questions for their backup people:

> **Figure 1: Questions for Employees – Preventing Emergencies and Keeping Off-hours Free**
>
> - What are your most important internal and external relationships, and do you have any arrangements with them that are outside of standard procedures?
> - What are your core job functions in order of priority, so we can make sure to prioritize things the way you would?
> - Where do you keep critical files that could be used to answer a question from an internal or external client on your behalf?
> - What are you afraid might go wrong while you are using workflex, and how can we help make sure that it doesn't happen?
> - What issues are important enough to call you off-hours, and how can you best be reached: phone, text or email?

There may be other questions that you would add to this list to help staff support one another to take full advantage of workflex.

- **Position workflex as emergency management and as a return on investment tool.** People in large and small organizations can easily get wrapped up in the moment, focusing on getting through each small crisis rather than coming up with long-term solutions. For small organizations, especially those without long histories, "now" can seem to be the only moment that matters. When the culture of an organization becomes too focused on short-term problems and solutions the all-hands on deck approach seems to be the only one that works. Throwing everything you have at every issue means that you have neither the time to develop plans for reducing the number of crises you face nor the opportunity for employees to recoup their strength between challenges, resulting in more turnover as employees burnout. As a small business, you probably don't have lots of saved resources or other branches to call on for help. A sudden shift of fortunes that a larger organization might weather without a ripple can be disastrous for a small organization.

  Workflex is an opportunity to get ahead of the crises and plan how you will deal with intense demands while protecting employees from burnout. For example, organizations with strong workflex policies are better able to respond to sudden workforce shortages and disruptions to their workplaces (such as a fire or inclement weather) because employees are practiced at exchanging responsibilities and working in different places. Workflex can also be an opportunity to streamline work. When employees answer the questions listed in **Figure 1**, they better understand how much value each task offers the organization. With that knowledge in hand, it's a lot easier to restructure jobs so that employees are providing maximum value for their efforts.

  One way to develop a workflex process and make everyone aware of how it will help in emergencies is to have a workflex hackathon. Collect a group of employees from across the organization to identify all the ways in which their teams or departments could be disrupted.

Figure 2: Questions for Employers – Preventing Work Disruptions

- Who are the keystone employees?

- What are the projects that can't afford to be disrupted, and are there enough people to keep them going?

- What would happen if the power went out in the building for more than 24 hours?

- Who would have time to learn new skills/rules if the industry/legal/technical standards were to shift suddenly?

- What work could be dropped for an extended period of time if you can't get everything done?

The answers to these questions in **Figure 2** are not only good for emergency planning, but they are also valuable for increasing the return on investment in employee time. Employees often accrue a variety of tasks that are either so low priority that they should be abandoned or that desperately need to be redesigned to increase productivity. However, in work cultures where one does not have the opportunity to examine how and why you work, the opportunity to drop low value tasks in favor of more high value tasks or redesign work for greater productivity is hard to tackle. The questions you ask to plan for emergencies are the same questions used to determine what is really worth doing in normal situations. Workflex is an opportunity to engage both employers and employees in this process. Employees will invest in work redesign because it can get them more free time and help them shed low value busy work, and employers get more out of their employees by focusing their efforts on high value activities.

How can small organizations pursue workflex with limited resources?

Though people tend to imagine that workflex is a costly endeavor, there is, in actuality, such a wide range of workflex options that one can usually find an arrangement that is minimal or no cost (e.g., shift and schedule adjustments where the same amount of work is accomplished). In addition, research has shown that the benefits of workflex options can outweigh the costs by reducing absenteeism, lowering turnover, improving the health of workers and increasing productivity.[4] The following tips are designed to help you make the most of limited resources when designing workflex.

- **Collaborate with employees to identify low or no-cost options first.** One common misconception people have when employees ask for workflex is that the employee is asking for a specific program or policy. Though an employee may build their request around a specific option, what they are really saying is that the current way of working is not effective for them, and they would like to find a new way to work where they will be more effective. The specific policies they mention are merely the best ideas they have had on their own to accomplish that goal.

This means that you have the opportunity to collaborate with employees to develop work-flex options that will enable them to be effective on and off the job at whatever cost you feel is reasonable. Work with the employee to understand what they are trying to achieve. Some of the traditional systems of flexibility — vacation and sick leave, for example — often require that employees ask for more than they really need (e.g., having to take an entire day off when an hour would do) because there was no system to ask for less. Employees are likely to do so now, asking for a big program that they have heard about rather than the specific fix they need in the moment.

For example, if an employee just needs to be able to drop a child off at school, creating a schedule change may be more reasonable than telework (which might incur costs for purchasing equipment). The employee's goal is not the expensive workflex option; his or her goal is to make his or her life work more smoothly. Ask employees what they are trying to accomplish with workflex. You just need to know when, where and how they can and cannot get work done effectively. Some sample questions to ask are:

Figure 3: Sample Questions for Employees Requesting Workflex

- What times are you (un)available to work? Does that include any commuting or setup times?

- Where will you be when you are available to work?

- What tasks and stakeholders would be impacted by changes to how, when and where you work? What is most critical to them, and is it compatible with your needs?

- Is there anyone that could cover for you? Is there anything you could do for them in return, so everyone gets support?

- Can your needs be met by other options such as adjusting your breaks and start or stop times?

Note that these questions do not focus on sensitive information like family medical conditions, and, thus, they help you avoid making decisions based on whether you feel that the employee's reason is good enough to merit workflex. Develop the workflex solution based on making employees effective; then, if appropriate, follow up with inquiries into any personal matters for which the employee may need additional support or counseling (e.g., referrals to the EAP). This will help mitigate any potential bias that may emerge from knowing those details while developing the workflex plan.

- **Consider costs and benefits broadly.** If you find that the minimal cost options are not providing your employees with the flexibility they need, you will want to examine how your resources are being expended before you refuse a workflex request. Workflex options that cost money may actually save you more money than you spend when other costs are considered in tandem. For example, switching to a telework-friendly system may allow you to save money on rent and utilities by reducing your real estate footprint. Recruitment and hiring

budgets may be reduced along with turnover if workflex programs make effective people more inclined to stay. Consider what the potential costs are to the organization of not providing workflex along with the benefits and costs of providing workflex. In the end, it's the bottom line — the net cost to the organization — that matters, not the specific costs of workflex itself.

Generating these figures can be difficult for smaller organizations or individual teams that do not have extensive HR analytics systems at their disposal. However, there are ways to generate some of these critical numbers on your own for free. For example, if you think workflex is a good solution for turnover, but you don't have HR staff skilled in those analyses, you can use free tools like **hrcosting.com/hr/** to calculate important HR related financial figures, like the cost of turnover. Alternatively, you can use ballpark estimates provided by research. For example, the Society for Human Resource Management's 2011 **Executive Brief** estimates that in organizations with fewer than 1,000 employees, hiring costs $3,079 per hire. From there, it becomes a lot easier to see whether the savings of reduced turnover exceeds the costs of workflex. For example, if a laptop costs about $900 and replacing an employee costs over $3,000, purchasing a laptop to retain an employee through telework becomes a much easier decision.

- **Be proactive and plan ahead.** Some workflex options have greater costs when they are done as singular reactions to specific situations. For example, purchasing a laptop for a single employee to work from home may cost $900, but if, at the same time, you were to buy laptops for all the employees likely to telework, you may reduce the cost per laptop significantly. This may be a larger upfront cost, but may be worthwhile if you can look for additional ways to leverage the investment. For example, more telework capable employees may make it easier to expand your market area since employees can travel to meetings and stay up to date on their work more easily.

  Another place to consider workflex over the long-term is your use of space. Successful small organizations can become successful larger organizations, adding more people over time. This means you will likely outgrow your space, but may find you don't have the resources to afford both a bigger space and the additional employees. Workflex that allows for staggered work times or telework may help you manage your staffing and space needs during periods of growth without making commitments to larger spaces that may backfire if the business shrinks again. Workflex can be used to help you manage costs as the demand for your products and services wax and wane.

How can you convince a leader to give workflex a chance?

While most workflex supporters will find that they will need to spend some time convincing leaders of the value of workflex and persuading them to try out new ways of working, small businesses add an additional twist to this process. In larger organizations, you have multiple ways to get workflex established: different leaders to sponsor your efforts and different teams or departments who might pilot a workflex program. In small businesses, you may not have so many options. The leadership team is probably also small — possibly even just a single leader/

founder — making it a lot harder to pilot small scale efforts to demonstrate that workflex can work in your organization if those leaders are reluctant to give workflex a chance.

The following persuasive strategies are designed to help you convince an essential leader to give workflex a try without a lot of backup from other leaders.

- **Identify the issues and persuasive strategies that matter most to the specific leader.** A common mistake that workflex supporters make in their persuasive efforts is to provide reasons for workflex that they themselves find compelling or that a generic leader would find compelling. For example, a workflex supporter may spend all his or her presentation time talking about how much employees need workflex (personally compelling) or how it would reduce turnover costs (compelling to a generic leader). After this bid failed, he or she would learn that the actual leader who needed to be convinced is focused on growing the sales market and doesn't care about turnover.

  When preparing a presentation or other persuasive effort, you will want to identify the strategic goals, metrics (numbers and or stories) and advisors/role models you will need to convince your specific leader.
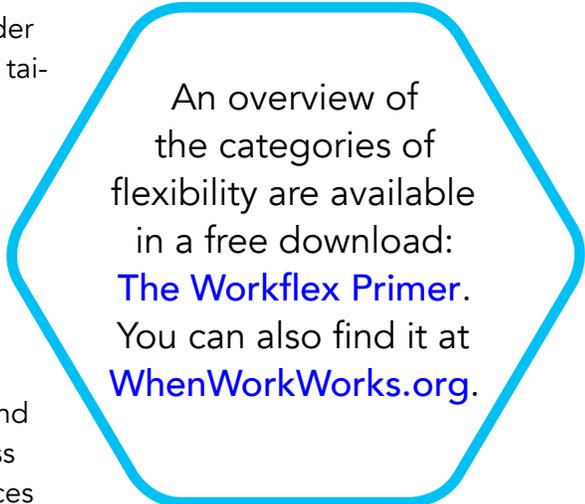
  1. First, work out what *strategic objectives* are most pressing for him or her right now. Where is the business going and what needs to happen for its next endeavors to succeed? What does the leader talk about as being high priority? Does workflex support that option or at least have no effect? Frame the value of workflex in terms of those most important items. You can include other information, but a pile of great but tangential benefits may be less effective than giving good exposure to a few highly desired outcomes.

  2. Second, look for the *metrics* that are most persuasive to your leader. This may be numbers (e.g., cost of turnover vs. savings of workflex), stories (e.g., an exit interview from a highly respected employee who cites workflex as the reason to leave) or some combination of the two. For example, employee X (a critical member of the marketing team) left because he couldn't telework; it will cost us over $3,000 to replace him, and it would have only cost us $900 to keep him). The key is to offer information that is both emotionally and intellectually engaging to your leader.

  3. Third, look for people that the leader sees as *role models and advisors*, including those who are seen as especially rigorous, even skeptical, and, thus, their opinions are especially valued. Ask their insights about what goals and metrics the leader values and how they present information to persuade the leader that workflex will work for the organization and the employees. Once you have worked through your approach with these leaders, you will be well prepared to present it to the final decision maker. Furthermore, it they have become allies with you, your case will be stronger still.

- **Engage your audience.** Leaders, especially leaders in small organizations, often like being involved. They want to have influence on the way things are done. It's one of the reasons they may have joined or founded the organization. After making a presentation about workflex, invite their feedback. Even if it is harsh or if you can't respond to it immediately, it

will help you better calibrate the goals, metrics and advisors you need to tap for your next attempt and will show you what the leader questions or doubts. You should respond to feedback with questions that shift the leader from thinking about how workflex is flawed to how workflex could succeed, like:

- Given that limitation, is there any way in which you could see this working?

- If we could patch up those problems, would you be open to giving workflex a try? If not, why? What else do you need to feel comfortable?

- Would you be open to a small, time-limited pilot with clear metrics where we could refine our approach to workflex?

- **Remember that leaders have mixed motives and care about things outside the business.** People have a tendency to imagine organizational decision makers as being driven first and foremost by the good of the organization. Therefore, arguments couched in the business case should be enough to sway these leaders to change policies and themselves. In reality, leaders are humans with all the dreams, anxieties and personal motivations that any other human being has. If your leader seems consistently opposed to workflex despite a solid, tailored business case, consider the following things:

  - *Is there a personal story behind your leader's resistance?* Your leader may have had a bad experience managing someone who was working flexibly and then quit or may have wanted flexibility himself or herself but managed without it and resists efforts to offer others what he or she had to forgo. If you have a sense of the personal story behind the resistance, you will be better prepared to address it. You may not be able to ask about these experiences directly, but considering your leader's past experiences may enhance your arguments for workflex.

  An overview of the categories of flexibility are available in a free download: The Workflex Primer. You can also find it at WhenWorkWorks.org.

  - *Is there a clear and reliable way for the leader to manage anxiety about performance and responsiveness?* Some leaders balk at workflex because they have a well-developed method of employee management that is based on the use of in-person conversations and observations. Others are just so busy that responding to unforeseen employee requests can be disruptive to their plans. In both cases, the shift to a new and more dynamic management style can make them feel out of control and anxious about their own performance as well as that of their team. If a leader is resisting workflex because it is anxiety provoking, you can emphasize the ways in which the manager can regain control if things go wrong. Short-term pilot programs, pre-planned review dates, weekly updates, a clear way to ask for help and a well-identified back-up staff are all examples of efforts that enhance a leader's confidence that he/she can smoothly respond to a crisis even in the midst of a robust workflex program.

- ***Does the leader assume that inflexible work tells him/her something about the character of others or him/herself?*** For example, is working late every night seen as a sign of commitment, ambition and reliability? If so, you will need to showcase examples of employees who are very committed, ambitious and productive while working flexibly to help create alternative markers of these valued characteristics. Otherwise, the leader may continue to assume that inflexible employees are the same as good employees. Remember to highlight these moments for both the leader and employees. Leaders are unlikely to see positive qualities in flexible workers if they can't see those qualities in themselves when they work flexibly. It is possible that a high-level leader who is resistant to workflex doesn't have very many sources of feedback about maintaining good worklife fit for him/herself. If possible, take the opportunity to provide that upward feedback so the leader can identify personal success not just in working hard, but also in living well.

- ***Has your argument indicted the past?*** A mistake that change agents can make is to imply that their audience has made mistakes or lived their lives incorrectly. In all likelihood, a leader who resists workflex has been successful while working inflexibly. Efforts at persuasion that suggest that they lived their lives incorrectly or that they made mistakes may make them defensive and prompt them to resist your arguments not because they lack merit, but because to endorse them is to accept negative assumptions about themselves. It is important to talk about how workflex can be of value to everyone going forward without making leaders feel like they must defend their past personal decisions.

- ***Does workflex conflict with other assumptions they have?*** Though workflex is not a women's problem and men need workflex, too, some leaders may see workflex through lenses of gender and other social roles that get in the way of their appreciation of its possibilities. It is unlikely that you will be able to change such beliefs easily or quickly, if at all. Instead look for ways to reframe your arguments about workflex in new ways that are more consistent with the leader's perspectives. For example, parental leave could be framed as an opportunity to put an employee's home life in order after a birth so they can be better focused on work going forward rather than as time to bond with spouse and child. If possible, avoid arguments that require a leader to change his or her social and cultural expectations before workflex gets into place. It will be much easier to make that case once workflex is working at your organization, and you can use its success as an example that the world of work is continuously changing.

Conclusion

Clearly, the belief that workflex is not possible in smaller organizations underestimates the capability of small organizations to reinvent how, when and where they work. Though small organizations may have fewer formal workflex policies — and those policies may look different than what their larger counterparts have — those unique efforts are the key to their success despite the limitations of small workforces and fewer financial resources.

How will you reinvent work to make the most of your staff's talents while helping them thrive on and off the job? When you do, the organization and the employees benefit!

Appendix 1

Appendix 1: ATCorp's Flexibility and PTO Policies

Extended Leave Bank (ELB)

Architecture Technology Corporation (ATCorp) provides paid Extended Leave Bank (ELB) benefits to all eligible full-time employees for periods of temporary absence due to illnesses or emergency absence. ELB is designed to assist an employee with extended leaves. Extended leaves refer to Family Medical Leave Act (FMLA), Short Term Disability (STD) bridge, Bereavement, Maternity Leave, Serious Health Condition and Military Duty. In many instances, ELB may be used concurrently with FMLA.

Every December 31, employees may roll unused banked Paid Time Off (PTO) hours in excess of 120 hours (15 days) into their ELB. Employees may bank up to 240 hours (30 days) of PTO in their ELB. Once the ELB reaches the maximum of 240 hours, employees are no longer able to add to their ELB.

Each new employee will receive a one-time deposit of 40 hours (five days) in their initial ELB bank.

ELB pay is calculated based on the base pay rate at the time of absence and will not include any special forms of compensation, such as incentives, commissions, bonuses and overtime or shift differentials.

Employees are not allowed to borrow or have a negative ELB balance. It is the employee's responsibility to ensure that they have enough time available to them prior to taking ELB.

To take ELB, employees must fill out the ELB time off request form. ELB time off must be approved by the employee's Supervisor, Human Resources and the President of the company. If an employee chooses to take time off prior to ELB approval, the employee will be expected to use PTO to cover those days. ELB will only be paid once it is approved.

At the end of the year on or around December 15th, each employee will be given a PTO / ELB designation form. Employees who are eligible to roll hours into their ELB must complete the form and return it to Human Resources no later than the last business day of the year, December 31st or the closest business day. Specific due date will also appear on the PTO / ELB designation form.

Employees who choose not to complete the PTO / ELB designation form (by no later than the last business day of the year, December 31st or the closest business day, and who are eligible to apply hours to ELB) will forfeit the ability to rollover ELB hours and will lose any PTO that is not eligible to rollover.

Interns are not eligible for ELB. Interns who are offered full-time employment immediately after the completion of an internship will immediately receive their deposit of ELB hours.

Upon termination of employment, employees will not be paid for any banked or unused ELB hours.

Paid Time Off – Earned

3.1c Full-Time Employees PTO

Employees in their first year of service will earn PTO at the rate of eight hours (one day) per month for each month worked, up to a maximum of 96 hours (12 days). Military leave has no effect on this calculation.

Paid Time Off (PTO) accrual schedule for a full-time Employee:

Years of Eligible Service	PTO earned per pay period	Maximum PTO hours earned per year
<1 year of service	8 hours (1 day) per pay period	96 hours
1 – 3 years of service	12 hours (1.5 days) per pay period	144 hours
4 – 6 years of service	14 hours (1.75days) per pay period	168 hours
7 – 15 years of service	16 hours (2.0 days) per pay period	192 hours
16 - 16+ years of service	18 hours (2.25 days) per pay period	216 hours

3.2a Family Medical Leave Act

Employees who take FMLA are expected to exhaust all of their ELB before using their PTO. After ELB is exhausted, Employees on FMLA may use any PTO they have available prior to taking Time Without Pay (TWP). FMLA may not exceed 12 weeks in a 12-month period, even when using PTO and ELB. Use of ELB for FMLA may not exceed the employee's available ELB hours. While on ELB employees are not eligible for holiday pay.

3.2b Short Term Disability (STD)

ELB may be used for bridging the gap between leave and STD eligibility. ELB cannot be used in lieu of STD benefits. ELB may be used only for the elimination period resulting in STD leave of absence. Use of ELB for STD may not exceed the employee's available ELB hours.

Employees who have depleted their ELB are not required to use PTO to cover the Short Term Disability elimination period. Employees may take TWP during the elimination period only if they do not have enough hours in their ELB. While on ELB employees are not eligible for holiday pay.

3.2c Bereavement

An employee may, with their Supervisor's approval, use available ELB hours for additional time after the death of a spouse, domestic partner, parent or child if the employee needs more time

after using the bereavement days granted by ATCorp. Use of ELB for bereavement may not exceed the employee's available ELB hours.

TWP may be granted if an employee has no available hours in their ELB and wishes to take additional time off after exhausting Bereavement pay. TWP may not exceed 40 consecutive hours. While on ELB employees are not eligible for holiday pay.

3.2d Maternity Leave

Eligible employees are able to take up to a maximum of 12 weeks of Family and Medical Leave (FMLA) in a 12 month period. In the case of the birth of a new child, employees may use their ELB after their STD is exhausted to supplement their income for up to a maximum of six more weeks. This leave will run concurrent with Family and Medical Leave Act (FMLA).

In the case of the non-birth parent, eligible employees are also able to take up to a maximum of 12 weeks of FMLA for family obligations relating directly to childbirth, adoption or placement of a foster child. Non-birth parents may use available ELB and PTO to supplement their income during the approved leave. Once ELB and PTO are exhausted, the remainder of the FMLA will be TWP. While on ELB, employees are not eligible for holiday pay.

3.2e Serious Health Condition

A serious health condition means an illness, injury, impairment, or physical or mental condition that involves inpatient care in a hospital, hospice, a residential medical care facility or continuing treatment by a health care provider. Generally, a chronic or long-term health condition resulting in a period of three consecutive days of incapacity with the first visit to the health care provider within seven days of the onset of the incapacity and/or a second visit within 30 days of the incapacity would be considered a serious health condition.

ATCorp provides leave to eligible employees who wish to fulfill family obligations relating directly to care for a child, spouse or parent with a serious health condition or the serious health condition of the employee. The employee may use PTO only after exhausting ELB.

This type of leave will generally run concurrently with FMLA. Please see the FMLA policy, Section 6.2 for additional information.

Use of ELB for a serious health condition may not exceed the employee's available ELB hours. While on ELB employees are not eligible for holiday pay.

3.2f Military Duty

Employees who are activated for military duty for periods of time that are less than two weeks may use their ELB to help supplement their leave without exhausting PTO. Use of ELB for this may not exceed the employee's available ELB hours. While on ELB, employees are not eligible for holiday pay.

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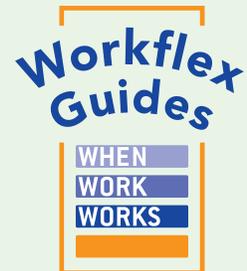
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Endnotes

[1] FWI and SHRM define "workflex" as workplace flexibility that works both for the employer and for the employees. Work-life fit, as we define it, includes access to flexibility as well as support from the supervisor, coworkers and the organization in using it. Finally, we see work-life fit as one critical aspect of an Effective Workplace where employees also have opportunities for learning, autonomy, supervisor support for work success, a culture of trust, and satisfaction with earnings, benefits and opportunities for advancement.

[2] Copies of all the National Study of Employer reports are available for free download at Whenworkworks.org

[3] The Council of Economic Advisers. (2014). Work-life Balance and the Economics of Workplace Flexibility: **https://www.whitehouse.gov/sites/default/files/docs/updated_workplace_flex_report_final_0.pdf**

[4] Ibid.

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