Carleton

Managers's Guide to FlexWork

As a manager, you are well-positioned to make informed decisions about working flexibly that align with departmental, divisional, and college guidance. We ask that you let the nature of your team's work drive decisions around flexible work arrangements. This guide will help you think through and create a plan for FlexWork in your area.

> 📖 Make sure you have read and understand the [FlexWork Policy](). Contact Human Resources if you have any questions or would like support working through a FlexWork plan for your team.

Before you begin

Review departmental and divisional work expectations

Although we all share the same mission, the requirements of our work can vary considerably. As such, work expectations and the level of flexibility available are not static across campus. We ask managers to confer with their department and divisional leaders to determine the general position and guidance around flexible work.

Employees are generally expected to be on-campus when their work requires an in-person presence, regardless of their FlexWork Schedule. In-person attendance is highly encouraged for most all-staff events and is required for events like the President's Quarterly Meeting.

Related questions

- What is my department or division's guidance on flexible work arrangements?
- Does the department or division share common core hours, or do they vary?
- What are the expectations around meeting and event attendance?
- Is there specific guidance for certain positions?

Review the eligibility criteria of FlexWork

- Employees must be able to maintain performance and productivity standards.

- Employees must be fully accessible during their scheduled approved work hours. This includes attending virtual meetings and answering phone calls.

- Employees must be able to return to campus, as required, for on-campus meetings, events, and duties, sometimes with limited notice. – In-person attendance is required for specific meetings (i.e., Quarterly Meeting, LAB, etc.)

- The employee's department must maintain the quality of their services to campus community members, visitors, customers, etc.

- A flexible work agreement (FWA) must be completed and fully executed in Workday before FlexWork begins. Existing FlexWork Agreements must be updated in Workday by January 19, 2023.

Carleton

Manager's Guide to FlexWork

Review the core principles of FlexWork

FlexWork supports and should not diminish Carleton's collaborative and inclusive culture.

FlexWork is not suitable for all positions.

FlexWork arrangements fully align with job duties.

FlexWork promotes positive work experiences.

FlexWork arrangements maintain or increase performance results.

FlexWork depends on training, technology, and manager support

FlexWork decisions are equitable.

Review related policies

All employment arrangements, including FlexWork agreements, must comply with internal policies and state and federal regulations. Managers are encouraged to take a moment to refresh their knowledge by reviewing the Staff Handbook. Special attention should be given to the following sections/policies:

- Pay and Hours
- Data Management and Access Guidelines
- Data Risk Classifications Guidelines
- Community related policies

FlexWork Implementation Process

Step 1. Analyze the Nature of the Work

Why it's important

Not all positions lend themselves to FlexWork arrangements. Some aspects of the work for most positions must be done on-campus or during a specific time window. Similarly, many positions have aspects of the role that are more flexible. As a manager, you must consider the nature of the work and let that inform your decisions about where, when, and how work should be done. The nature of the work should be the primary driver in your decisions about flexible work.

Consider Department Requirements

Effective support of the college mission is our priority. All FlexWork arrangements must maintain or increase performance results, including service to our students, employees, and key constituents while maintaining a vibrant and connected campus community.

- Specific job functions that require being on-campus.
- Days/times needed for in-person support of students or colleagues.
- Number of staff and position types needed for on-campus support/functions.
- Needs for staff connection on-campus (meetings, collaborative work, etc.).
- Coverage options for unscheduled absences.
- Workspace needs in a flexible environment (shared workspaces, fewer dedicated offices, etc.).

Document Core Hours

If Core Hours have not been set by your department or division, you should define core hours when all staff should be available. Typically these are 9 am – 2 pm, but can vary.

Carleton

Manager's Guide to FlexWork

Develop Expectations

- Review general communications standards listed in the FlexWork Policy
- Establish expected response times
- Clarify preferred means of communication (phone, email, etc.)
- Consider the type of data the team accesses and what controls are needed to protect sensitive data.
- Consider if team meetings can be effectively conducted virtually if not all team members are on-campus

Related questions

Begin with the nature of the team's collective work.

- What is the team responsible for, and what parts of the team's work must be done in person?
- What parts of the team's work can be done virtually?
- What parts of the team's work has always been done in person? Why? Is it possible to do it differently and still achieve the required results?
- What other departments are impacted by your team's performance?
- What level of on-campus presence is required to maintain the service standard for your area?
- Is the work of your team cyclical? Are there opportunities to provide increased flexibility during certain times of the year?
- How is success defined in your area? Will flexibility increase or decrease your team's ability to be successful?

Then, consider the nature of the position's work. Do this for each position on your team.

- What drives productivity in this role? (focus, coordination, collaboration, etc.) What helps employees accomplish the highest impact responsibilities?
- What parts of this position's work and responsibilities must be done in person?
- What parts of this position's work can be done virtually?
- Will a flexible arrangement for this person burden another employee?
- What parts of the position's work have always been done in person? Why? Is it possible to do it differently and still achieve the required results?
- What are this position's flexibility options based on the nature of its work and responsibilities?

Step 2. Consider Individual Performance

Why it's important

After you have decided what kind of flexibility you can offer each position, consider the employee's performance record.

Performance Factors

If this is an employee that you have supervised before, review their annual performance appraisals, achievements, and opportunities for improvement as you consider the employee's:

- Current productivity standard and history of success.

- Punctuality and ability to adhere to a work schedule and report absences from work.
- Adherence to scheduled hours and timely, accurate reporting of hours worked (if applicable).
- Ability to independently accomplish duties and meet established deadlines.
- Proven ability to set appropriate boundaries and separate from work during their time.

Step 3. Understand Individual Preferences and Readiness

Why it's important

After you have decided what kind of flexibility you can offer each position and have considered an individual's performance, discuss with employees you supervise (or who have requested FlexWork) about their preferences within those parameters.

Questions to discuss with the people you supervise

- Given the flexibility your position can have, what are your preferences?
- Consider your experience with on-campus and off-campus work. What worked well? What didn't work well? What type of management support worked best?
- What concerns do you have about working with flexibility? What are you excited about?
- Do you have the tools and resources necessary to work with increased flexibility (computing equipment, high-speed internet, ergonomic workstation, childcare arrangements, etc.)?
- Do you have a distraction-free work environment if work will be performed off-site?
- What support would you need from me to be successful with a FlexWork arrangement?

Questions to ask yourself

Managing FWAs requires increased management effort, at least at first. Consider these questions about **your preferences and capacity**:

- What level of time, energy, and support do I need to manage the work of a flexible team?

- What will business and non-business hours look like for the entire team? How do I make sure everyone is on the same page?
- What must I do to ensure expectations, priorities, and deadlines are clearly communicated in a flexible environment?
- What type of professional development do I need to manage the work of a flexible team?
- What type of professional development does my team need to perform well in a flexible environment?
- How will I measure the performance of my team and individual contributors? What indicators do I need to watch so I can address issues immediately?

Step 4. Communicate the Scope of Flexibility Available

Why is this important?

As employees begin to prepare their FlexWork Agreement Forms, it is helpful to understand the range of flexibility offered in the department and their roles. This will help facilitate the FWA review and approval process and reduce the chance of unachievable expectations.

Manager's Guide to FlexWork

Team's collective options

Talk through the nature of the team's work, which parts of the work can be flexible, and why.

- Use specific examples when possible. "These are team responsibilities that need to be done in-person or on-campus (e.g., meeting students, colleagues, peers, etc., processing mail, printing, etc.), and these are the responsibilities that can be done virtually (e.g., individual project work or tasks, virtual professional development, etc.)."
- Discuss any variations. For example, do expectations change during breaks? Is there a particularly busy time when less flexibility will be provided or a less demanding time when more flexibility will be offered?
- Remind the team that this is a pilot program, and it may be adjusted as needed.

Individual options

If there is an individual on the team who will have more or less flexibility than the team, make sure you address it with them privately.

- Describe the type of FlexWork (flextime, job share, hybrid, etc.) you think the employee's position could allow based on the nature of their work.

- If specific parameters have already been developed for the department or division, share those with the employee. "Responsibilities [x, y, & z] are flexible. However, since we still need [a, b, & c] done on-campus, your position will need to work on-campus at least # days a week."

- Give employees an opportunity to voice their thoughts and opinions about the scope of flexibility available. Listen and consider their feedback. You may or may not choose to adjust your plan.

Step 5. Employees interested in FlexWork should complete a FWA

Why is this the employee's responsibility?

Although managers and departmental and divisional leaders are charged with designing and communicating the general framework for FlexWork in their areas, the employee is ultimately responsible for holding themselves accountable to the agreed upon FlexWork arrangement. For this reason, we ask employees to consider whether FlexWork is right for them and require employees to take the first step in developing a formal FlexWork arrangement.

Step 6. Review and respond to FlexWork Agreements

How do I do this?

- You will receive an inbox alert in Workday once an employee who reports to you completes an FWA.
- If you approve the agreement as written, click approve, and the form will be routed to the next approver on file.
- If you want edits made, click send back, and the form will be returned to the employee. You should follow up with them and discuss what changes you want.

Manager's Guide to FlexWork

- If you cannot approve the agreement based on operational needs or the employee's past performance record, click deny and follow up with the employee.

Step 7. Plan to Revisit and Re-evaluate

Why it's important

You may face some challenges in managing flexible work, and that's okay. FlexWork agreements can be changed at any time. All FWAs must be reviewed annually. All managers are encouraged to include discussions regarding FWA's in your supervisory meetings to verify that you and the other person are on the same page about what's working and what could be improved.

Related questions

- How will I track how working with flexibility is going with the employee? How often will I check-in?
- How will I hold myself accountable for checking in with them to determine what is and is not working?
- How can I ensure the voices of the people I supervise are heard? How will I communicate to them that I'm acting on their feedback?
- How will I give feedback if expectations about the work arrangements aren't being met?

Commitment to Equitable FlexWork Decisions

Why it's important

You must consider equity and bias in your flexible work decisions as a manager. You can make a difference by challenging status-quo ideas around work, being a part of a culture shift, and addressing inequities.

Here are common types of bias that can impact workplace flexibility:

- **Affinity bias** is when you give preferential treatment to someone because they share similar experiences or remind you of someone you know and like.
- **Recency bias** is when recent events or information are given more weight and importance than older ones.
- **Confirmation bias** is seeking or taking in new information to confirm your own beliefs.
- **Consensus bias** is when people see their thoughts, choices, and judgments as common and shared with others.

Related questions

- How will I make sure affinity bias is not affecting my decisions? Is how much I like a person driving any of my decisions (e.g., decisions around flexibility, recognition, challenging assignments, etc.)?
- How will I ensure recency bias isn't affecting how I treat the people on my team? How can I ensure everyone stays on the same page and that more recent information isn't given more importance than older information?

Manager's Guide to FlexWork

- How does confirmation bias affect the way I think and make decisions? What information contradicts my beliefs?
- How will I reward and recognize the people I supervise? What will I be basing my decisions on? How will I make sure that I don't fall into rewarding only the people I see most often (in-person or online)?
- How will I manage team members' workload so that it is distributed equitably? How can I invite employee input on workload distribution? How will I ensure meaningful work and opportunities are distributed equitably regardless of an individual's work arrangement?
- How might FlexWork help me better retain a diverse, high-functioning team?