



WORKFLEX TOOLKIT FOR CONGRESS



Part of the

“Life in Congress” Project

A Joint Research Partnership between the Congressional Management Foundation
and the Society for Human Resource Management

Produced in Conjunction with When Work Works, a Joint Project of the
Families and Work Institute and the Society for Human Resource Management

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About This Toolkit

The “Workflex Toolkit for Congress” is a combination of advice and research from several organizations that is designed to help educate congressional managers and employees about flexibility in the workplace. The booklet explains what workflex is, why it’s important, and how it can be implemented in Congress by addressing obstacles to workflex, conducting organizational and employee assessments, and drafting workflex plans that work for the office and for the staffer. The research and guidance is based on and adapted from the “Workflex Employee Toolkit,” a publication of **When Work Works**, a joint project of Families and Work Institute (FWI) and the Society for Human Resource Management (SHRM). Modifications to the original toolkit were made for the congressional environment by the Congressional Management Foundation (CMF) as part of the **Life in Congress** project, a joint initiative of CMF and SHRM. More information about these organizations and partnerships are below.

This toolkit is intended to be a guide and a reference. Read through it cover to cover if the concepts are new or you want an overall view, or skip to the sections you find most relevant. Specific sections, such as “Components of a Workflex Arrangement” and “Creating a Workflex Communication Plan,” have been excerpted from this toolkit and are posted on the **Life in Congress** page on the CMF website as separate worksheets for your use (www.congressfoundation.org/life-in-congress). Additional resources on workflex and work-life in Congress are listed in the Appendix of this toolkit. In particular, we advise you to consult the appropriate institutional and support offices listed in the Appendix to ensure you are following the laws, regulations, and rules of your chamber.

Acknowledgments

CMF and SHRM wish to thank all the employees of our respective organizations as well as the staff of FWI who contributed their time and expertise to this congressional toolkit. We especially thank: Nicole Folk Cooper, Bradford Fitch, Susie Gorden, and Camille Mendoza of CMF; Kenneth Matos of FWI; and Cassidy Solis and Lisa Horn of SHRM. We are grateful for the support we’ve received from congressional staff for the **Life in Congress** project, and for their participation in this research series. We are deeply appreciative of the committee, institutional, leadership, and support staff who answered our questions and reviewed material for this toolkit. We also thank the senior House and Senate managers who offered their insights and experiences, especially Tara Oursler (Rep. C.A. Dutch Ruppersberger, D-MD) and Susan Wheeler (Sen. Mike Crapo, R-ID).

CMF also would like to thank the leadership of FWI and SHRM for their generosity in allowing us to adapt the “Workflex Employee Toolkit” for Congress. The information and guidance provided through the **When Work Works** project is exemplary, and this guide is no exception. We thank the Life Meets Work team (www.lifemeetswork.com) for their contributions to and collaboration on the original toolkit, and we highly encourage congressional staff interested in workflex to peruse this document as well (www.whenworkworks.org/be-effective/guides-tools/workflex-employee-toolkit).

Society for Human Resource Management

Founded in 1948, the **Society for Human Resource Management (SHRM)** is the world's largest HR membership organization devoted to human resource management. Representing more than 275,000 members in over 160 countries, the Society is the leading provider of resources to serve the needs of HR professionals and advance the professional practice of human resource management. SHRM has more than 575 affiliated chapters within the United States and subsidiary offices in China, India and United Arab Emirates. Visit www.shrm.org/workflex.

Congressional Management Foundation

Founded in 1977, the **Congressional Management Foundation (CMF)** is a 501(c)(3) nonpartisan nonprofit dedicated to helping Congress and its Members meet the evolving needs and expectations of an engaged and informed citizenry. CMF's work focuses on improving congressional operations and enhancing citizen engagement through research, publications, training, and management services. Visit us online at www.CongressFoundation.org and follow us on Twitter at [@CongressFdn](https://twitter.com/CongressFdn).

Life in Congress

The **Life in Congress** project is a partnership between CMF and SHRM that seeks to identify human resource challenges in Congress and provide recommendations for overcoming them in order to make Congress a better place for both Members and staffers to work. Download reports and learn more at www.CongressFoundation.org/life-in-congress.

Families and Work Institute

Families and Work Institute (FWI) is a nonprofit research-to-action institute dedicated to providing research for living in today's changing workplace, changing family and changing community. Since the Institute was founded in 1989, our work has addressed issues in three major areas: the workforce/workplace, youth and early childhood. Families and Work Institute's research takes on emerging issues before they crest and includes some of the most comprehensive research on the U.S. workforce available. The Institute's work has helped change the language of debates to move the discussion forward toward more effective and data-driven solutions and to result in action. In addition, because the Institute conducts some of the only research studies of their kind, our studies are quoted in the media more than once a day and are regularly cited by decision makers in business, government and the public. Visit www.FamiliesAndWork.org, follow us on [Linkedin.com/company/families-and-work-institute](https://www.linkedin.com/company/families-and-work-institute), like us on [Facebook.com/FWINews](https://www.facebook.com/FWINews) and follow us on [Twitter.com/FWINews](https://twitter.com/FWINews).

When Work Works

When Work Works (WWW), a project of Families and Work Institute and the Society for Human Resource Management, is a nationwide initiative to bring research on workplace effectiveness and flexibility into community and business practice. Since its inception in 2005, When Work Works has partnered with an ever-expanding cohort of communities from around the country to:

- share rigorous research and employer best practices on workplace effectiveness and flexibility;
- recognize exemplary employers through the When Work Works Award; and
- inspire positive change so that increasing numbers of employers understand how effective and flexible workplaces can benefit both business and employees.

Visit www.WhenWorkWorks.org and join the workflex conversation by following us on Twitter: [@WhenWorkWorks](https://twitter.com/WhenWorkWorks), [@FWINews](https://twitter.com/FWINews) and [@SHRMPress](https://twitter.com/SHRMPress).

Introduction

The American workplace is undergoing a transformation in how and where employees do their work. The idea of a flexible work environment is becoming more prevalent, through technological advancements, greater resources and data to measure worker performance, and employers' desire (and business incentive) to retain high-quality staff. According to a 2014 nationwide survey of employers with 50 or more employees, 67% of companies allow employees to work "some" of their regular work hours at home occasionally, and 41% allow employees to change starting and quitting times on a daily basis.¹

Capitol Hill, as every congressional employee knows, is different. Employees have the same personal demands and goals as other workers: they juggle daily child care and commutes; care for older parents; and occasionally try to sneak in dinner with a spouse. But unlike most Americans, Members of Congress and their staff also have to pass annual budgets for the federal government, assist any constituent who has a problem with an executive branch agency, and occasionally make a decision whether to go to war.

Yet, retaining high-quality staff and ensuring they are engaged in their work (two benefits of workflex policies) is especially important for the workforce that is instrumental to making the laws of our land. Moreover, as the private sector continues to adopt creative workflex options, Congress will increasingly be at a disadvantage in recruiting and retaining staff. These factors suggest that congressional offices would be wise to implement workflex policies.

Congressional employers will proffer many of the same objections private sector employers put forth: "How do I know if employees are working if I can't see them?" "We're a small organization—how can we make this work?" Yet a legislative institution has its own unique characteristics. "What will happen if my Legislative Director isn't here when that unpredictable senator offers a floor amendment at 10 pm to gut my bill?" The easy course is to simply keep doing things the old ways—no flexibility in how, when, and where employees do their jobs.

But what if there were ways these concerns could be addressed? What if Members of Congress and congressional managers could have confidence that the essential and necessary work will get done AND employees will have the workflex benefits they desperately need? This booklet, "Workflex Toolkit for Congress," could show you the way.

We do not offer simple solutions, and any manager using any workflex policies will report that they require additional supervision and work. Yet, employers—even those in the U.S. Congress—can no longer ignore the overwhelming body of research proving that workflex policies *work!* Research shows that employees that have a greater degree of work-life fit are twice as likely to want to stay in their current jobs, four times more likely to be highly engaged at work, and twice as likely to be in excellent health.²

It is the authors' hope that this booklet provide some creative options to congressional offices. It's naïve to assume that a work environment as chaotic as Congress will rapidly shift its policies and cultures. But readers will see that solid, proven examples exist—even in Congress—that demonstrate the practicality, benefits, and value of flexible workplace policies. And given the trends in both the private and public sectors, it appears that employers should not be asking "if" they adopt new policies, but "when" and "how."

1 "2014 National Study of Employers," Families and Work Institute. April 2014. <http://www.familiesandwork.org/2014-national-study-of-employers/>

2 "The State of Health in the American Workforce: Does Having an Effective Workplace Matter?" Families and Work Institute. <http://familiesandwork.org/site/research/reports/HealthReport.pdf>

SPECIAL NOTE

Please consult with the appropriate institutional and support offices (listed in Section A2 of the Appendix) to ensure you are following the laws, regulations, and rules of your chamber.

WORKFLEX VOICES

“The Hill is a difficult environment for retaining quality staff. High pressure, tight deadlines, long hours, bad management, and low (comparable) compensation all contribute to high employee turnover and make it difficult to ensure that quality staff is developed, trained, and retained. I know that a lot of senior managers view working on the Hill as enough of a privilege that people shouldn't complain about the other challenges, but that's not a realistic way to build an effective organization.”

—*Senate Legislative Director*

1

Why Workflex?

When the term “family-friendly workplaces” was coined, flexible work options were seen as assistance that employers could provide to employees to help them manage their work and personal lives, especially around child care and elder care. Today, we have come to think about workplace flexibility differently—we consider it a business strategy that can help all employees and organizations succeed. This approach is especially noteworthy for Congress, which in recent years has faced reduced or stagnant office budgets, dramatic changes to staffer health care benefits, and high turnover of staff. More flexibility in the congressional workplace can help retain and attract the best employees. We explain how below.

1A. Strategy, Not Accommodation

Research from Families and Work Institute (FWI) shows that when employers and employees partner in finding flexible ways to work, both benefit. Working flexibly can not only help employees manage their work and personal responsibilities, it can also enhance an employee’s effectiveness on the job.³ For instance, FWI’s research finds that employees with flexibility are:

- more engaged in their jobs and committed to helping their organizations succeed;
- more likely to plan on staying with their employer; and
- more satisfied with their jobs.

In addition, workflex creates other benefits for the employee: employees who have greater access to flexible work options have significantly better mental health than other employees. Clearly, flexibility can be a “win-win.” So why don’t more employees have the choice to work more flexibly?

One reason that flexible work options such as flex time may meet with resistance is that they challenge some long-held assumptions about work such as “presence equals productivity”—an assumption that doesn’t hold up in an economy that is increasingly turning to results, not just time on the job, as a measure of productivity.⁴ Another assumption flexibility challenges is “if you give employees an inch, they will take a mile.” But as FWI data reveal, the opposite is more likely to be true: if you give employees an inch (or more flexibility), they are more likely to go that extra mile for their employers. These obstacles to implementing workflex—and others—are discussed in Chapter 3.

3 “The State of Health in the American Workforce,” Families and Work Institute, September 2011.

4 “Reframing the Business Case,” Families and Work Institute, 1998.

1B. New Realities Driving Workflex

New realities—both on and off Capitol Hill—are changing how we think about workflex and are driving the implementation of workflex options in increasing numbers. For example, today’s workforce policies are influenced by:

- Increased support and requirements for telecommuting in the Executive Branch;
- Demonstrated need to have flexible work arrangements for business continuity during extreme weather and crisis situations;
- Changing family dynamics, with more dual-earner households and increased work-life conflict among male employees;
- An aging population, resulting in ever-increasing caregiving responsibilities among workers;
- An influx of younger employees into the workforce that desires more flexibility in their work;
- Technological capabilities that allow for employees to work at remote places and times; and
- Environmental concerns and increased traffic congestion, among others.

In addition to the factors above, the congressional workplace is also being shaped by:

- Reduced or stagnant office budgets;
- Dramatic changes to congressional staff health care benefits; and
- High turnover of staff, particularly in Washington, DC.

1C. Why is Workflex So Critical for Congress?

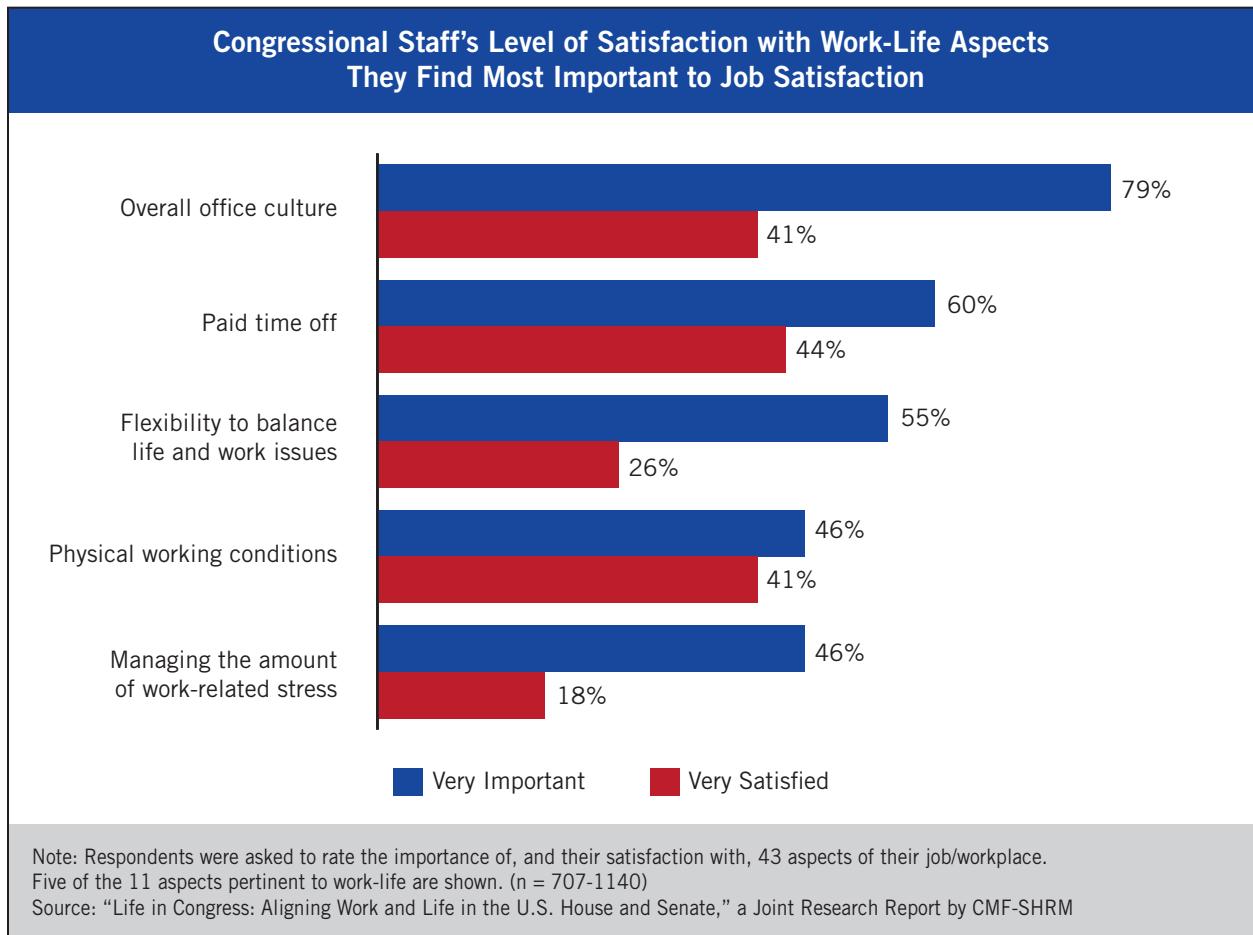
In addition to the larger congressional issues outlined above, recent CMF-SHRM research shows that congressional staff want flexibility in their workplace. In 2011, CMF and SHRM surveyed more than 1,400 congressional staff on 43 aspects that relate to their job and workplace.⁵ As shown in Figure 1, 79% of respondents rated “overall office culture” as very important, making it the aspect rated as most important to congressional staff. Despite this high level of importance, only 41% of staffers were very satisfied with their office culture—a gap of 38 percentage points. Additionally, more than half (55%) of congressional staffers reported that “flexibility to balance life and work issues” is very important to their job satisfaction, though only one in four (26%) is very satisfied with this flexibility—a gap of 29 percentage points.

The CMF-SHRM survey also asked congressional staff their opinions on a series of statements designed to gauge their level of engagement with their job and office. As shown in Figure 2, staff reported being concerned with their workload and the quality of their work product, with 33% disagreeing with the statement that “I usually have enough time to get everything done,” and 28% agreeing with the statement that, “I have too much to do to do everything well.” Given these responses, it is not surprising that 32% of congressional staff agreed that “Job burnout is a significant problem in my office,” and 32% disagreed that “I have adequate time for my personal life.”

5 “Life in Congress: Aligning Work and Life in the U.S. House and Senate,” Congressional Management Foundation and Society for Human Resource Management, October 2012. <http://www.congressfoundation.org/lic/aligning-work-life>

While the percentage of congressional staff sharing these views did not constitute a majority (except in some positions),⁶ these numbers are concerning when also considering their responses to factors that might offer a significant reason for them to leave employment (Figure 3). Of the factors that relate to work-life, congressional staff cited “to seek a better balance between your work and your personal life” (30%) and the “desire for a less stressful job” (23%) as significant reasons to leave their current job or their current office. However, even higher numbers of respondents cite these factors as significant reasons for leaving Congress altogether, indicating that many staff believe they need to leave Congress and not just their office if they are to find a better work-life fit.

Figure 1.



6 Congressional staff responses were analyzed by five position categories: Management, Policy/Legislative/Research, Press/Communications, Administrative/Support, and District/State. The analysis showed that staff serving in different roles sometimes held different views of their job and their workplace than those of their colleagues.

Figure 2.

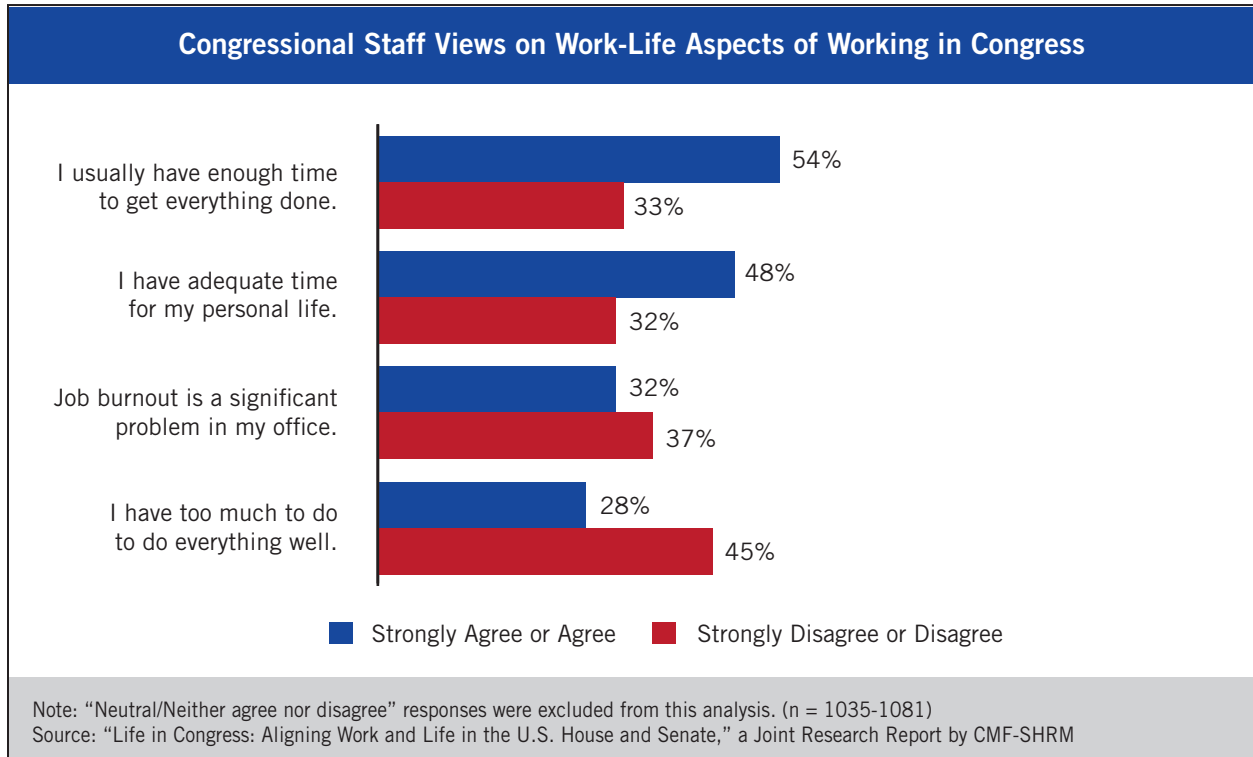
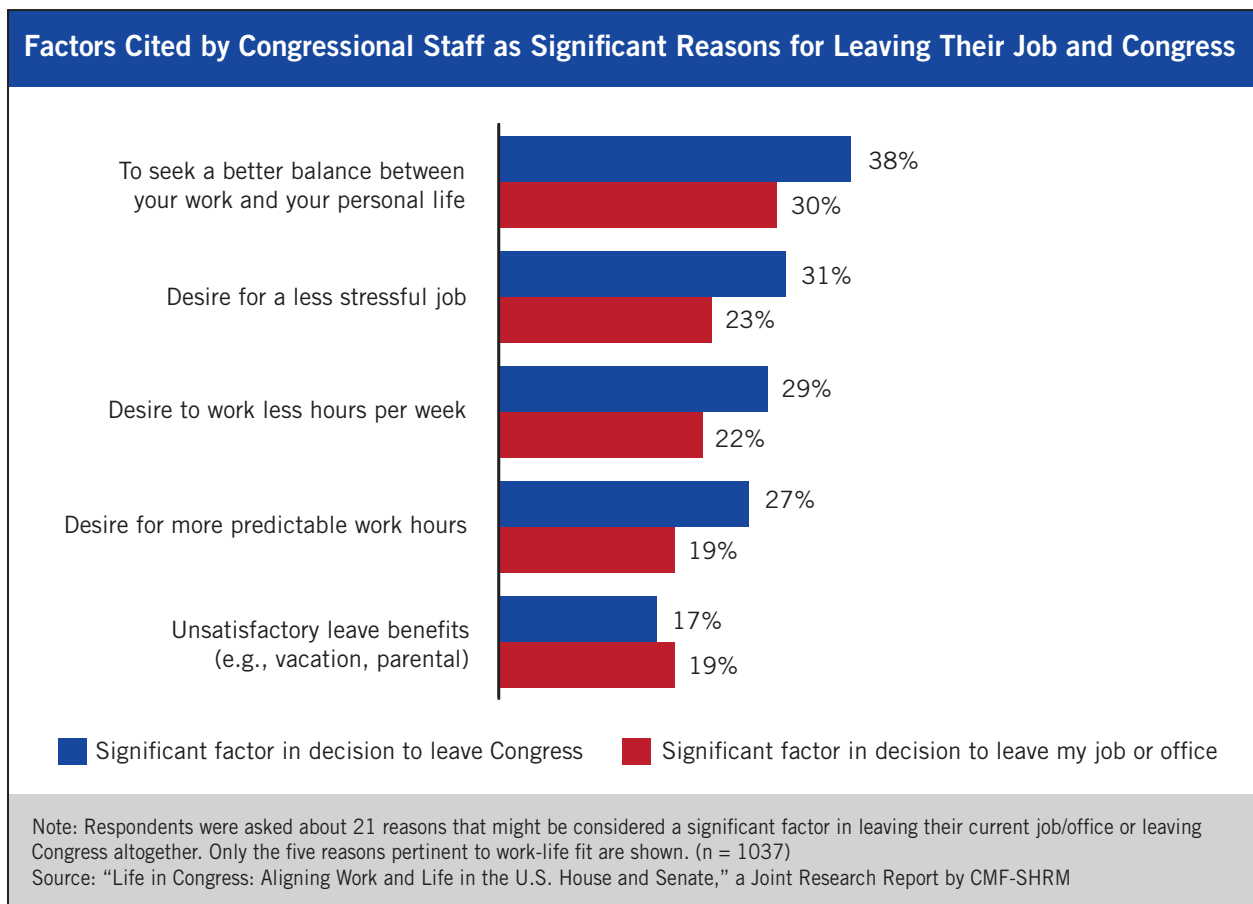


Figure 3.



2

What Is Workflex?

In this toolkit, we use the term “workflex” rather than terms often used in organizations such as “flexible work arrangements” or “alternative work arrangements” because we believe the word “workflex” is the new normal. It means flexibility that works for both employees and employers. For employees, our definition of workflex includes access to flexibility when it comes to where, when and how much you work. It’s about control; not only control over your work day, but also control over your whole career. For employers, it means utilizing flexible options as a business strategy to meet employee needs and achieve organizational goals. In other words, workflex can take many forms and provide many benefits to workplaces. This section will provide an overview of workflex for employees and employers.

2A. Reframing Workflex

We’ve identified the components of effective and flexible workplaces: opportunities for learning; culture of trust; autonomy; satisfaction with earnings, benefits and advancement opportunities; supervisor support for work success; and work-life fit including workflex. You may be thinking that workflex is a benefit or an accommodation—basically something employers “allow” employees to do because they don’t fit the standard mold for how work gets done. Frankly, yes, some employers still see it that way, too. But the conversation is changing and needs to change.

Today more employers are thinking about how to get the most productivity out of employees without burning out their most valuable resource. That means less force-fitting employees into the old way of working and more creating new ways to work that enable both the employee and the employer to succeed.

You will note that we don’t use the terms work-family or work-life balance in this toolkit (except in direct quotes). That’s because balance implies a scale where if you give to one aspect of your life (such as work), you take away from the other (your personal life). Studies show that isn’t the case. Work can enhance your non-work life and vice versa. We use the term **work-life fit**.

2B. Why Do Employees Want Workflex?

Everyone has his or her own reasons for wanting workflex. Traditionally, we think about it in terms of helping manage child care responsibilities like picking your children up from school or caring for them when they're sick. But it isn't just about child care. Here are some reasons employees may want workflex:

- Manage elder care issues
- Avoid peak commute times or reduce commute
- Use alternative transportation
- Work when you feel most productive
- Work when and where you have fewer distractions
- Maintain or improve your health
- Have more time to spend with family
- Know your schedule further in advance
- Reduce schedule conflicts
- Be able to schedule doctor, repair and other significant appointments during the workweek
- Volunteer during your normal work hours
- Care for a sick family member

These are all good reasons to want workflex. Once you've identified your reasons for wanting workflex, you need to find a schedule and work options that work best for you ... so you can be energized, engaged and successful both at work and in your personal life.

2C. Why Do Employers Offer Workflex?

Employees have several reasons to want workflex, but there has to be something in it for employers too, right? Absolutely! Thanks to decades of research and experience, many employers now understand that workflex isn't just about being good to their employees. It's also an effective business strategy. Here are some common benefits employers get from workflex:

- Reduce turnover costs
- Make it easier to recruit new employees
- Improve morale / engagement / job satisfaction
- Increase productivity
- Improve customer/constituent service
- Reduce the life stressors that distract employees
- Reduce district/state office lease and utility costs
- Recruit from a wider geographic area
- Reduce environmental footprint
- Maintain operations during disaster situations

For organizations, workflex is a way to achieve their goals and at the same time meet employees' need to have more control over their lives.

2D. Workflex Options

The workflex options outlined on the following pages can help congressional offices achieve the best fit between work and personal needs. As you can see, workflex comes in a variety of shapes and sizes. Some of these options may not be as suitable for the congressional environment as they are for other workplaces (e.g., shift trading), but we included them to give managers and staff a sense of how varied workflex options can be. Additionally, while the Senate has no staff limit, House Members are restricted in the number of employees they can hire,⁷ which may impact their approach to and options for workflex.

⁷ A House Member may employ up to 18 permanent staff and 4 additional staff (designated as paid interns, part-time employees, shared employees, temporary employees, or employees on leave without pay).

FLEX TIME AND PLACE

ARRANGEMENT	DESCRIPTION	BENEFITS	EXAMPLES
Flex Time	Workday starts and ends at times different than the established standard, but you still work the same number of hours per day	<p>Gives you more control over your time</p> <p>Allows you to commute outside of peak hours</p> <p>Improves efficiency if you work when you feel most productive</p>	<p>Daily flex (e.g., 10 am to 6 pm instead of 9 am to 5 pm)</p> <p>Short-notice schedule changes</p> <p>Summer hours</p> <p>Recess hours (e.g., different operating hours or additional flexibility when Congress is out of session or having non-voting days)</p> <p>Core hours (e.g., employees required to be present between 10 and 3; start and stop times may vary)</p>
Compressed Workweeks	Working longer days in exchange for equivalent time off each week or pay period	<p>Allows you to commute outside of peak hours</p> <p>Reduces commuting time</p> <p>Provides more days or time off</p> <p>May increase productivity if you work during quieter times of the day</p>	<p>4/10 workweek: four 10-hour days</p> <p>9/80 workweek: 80 hours in nine workdays over a two-week period</p> <p>4 ½ day workweek: 9-hour days Mon-Thurs with Friday afternoons off</p>
Flex Place (Telecommute)⁸	Working from home or other designated remote location for specified times each week, also known as telecommuting or telework	<p>Reduces or eliminates commute</p> <p>Expands the geographic territory in which you can work/provides an alternative to relocation</p> <p>Limits office-based distractions</p>	<p>Work from home full time</p> <p>Telework on set days</p> <p>Telework occasionally as needed</p> <p>Traveling employees (e.g., when an office offers constituent services at several locations throughout the district, such as local libraries)</p> <p>Work from satellite or mobile offices</p>

CHOICES IN MANAGING TIME

ARRANGEMENT	DESCRIPTION	BENEFITS	EXAMPLES
Uninterrupted Time	Specific days or blocks of time when no meetings are scheduled or when coworkers don't interrupt you	<p>Creates uninterrupted time for concentrated work</p> <p>Enables you to schedule your vacations when you know you won't miss important events or meetings</p>	<p>Regular set-aside time when you are free to concentrate</p> <p>No meeting days</p> <p>No meetings after 3 pm, for example</p>

⁸ The House and Senate have specific rules concerning telecommuting, including the use of equipment, security guidelines, and what expenses may be considered reimbursable. Prior to setting up this type of arrangement, please review your chamber's policies and contact the Committee on House Administration or the Senate Committee on Rules and Administration (see the Appendix for information).

Shift Trading⁹	Trading work shifts with coworkers to adjust your schedule	Gives you more control over your time	Employees swap shifts directly Employees drop shifts into a pool where they can be picked up by coworkers
Self-Scheduling¹⁰	Selecting your own shifts based on pre-set criteria	Gives you more control over your time	Using scheduling software, employees set their own schedules without the need for supervisor intervention

REDUCED TIME

ARRANGEMENT	DESCRIPTION	BENEFITS	EXAMPLES
Reduced Hours	Working fewer than 40 hours or fewer than the workplace norm	Gives you more time for family obligations or personal interests	Part-time work Seasonal time off or part-year work (e.g., summers)
Job Sharing¹¹	Sharing a full-time position by two part-time employees	Creates part-time opportunities in a full-time position Provides employee more time for family obligations or personal interests while office receives full coverage for staff position	Each employee works 2.5 days per week or other part-time schedules to provide full coverage on position responsibilities
Gradual Return to Work	Working less than a full-time schedule following a leave	Allows you to transition slowly back to full-time work	Working fewer days after a leave and gradually resuming full-time work or more hours

TIME OFF

ARRANGEMENT	DESCRIPTION	BENEFITS	EXAMPLES
Unanticipated Time Off	Being able to take some time off during the workday to respond to unexpected needs	Allows you to respond to last-minute emergencies	Attending a doctor appointment Waiting for a repair person
Family Leave	Being able to take an extended leave from work without losing your job	Allows you to focus on caring for yourself or your dependent, job guaranteed	Parental leave for birth or adoption Extended leave to care for a sick family member Transitioning back to work after a military deployment

9 While staff in personal, committee, and leadership offices typically do not work in shifts, this situation could apply when congressional offices host special events such as multi-day forums or conferences. It could also apply to employees in institutional and support offices whose positions are scheduled in shifts.

10 This option could be applicable to employees in institutional and support offices whose positions are scheduled in shifts.

11 “Job sharing” between staffers is different than hiring “shared employees.” In job sharing, two part-time employees share a single, full-time position, such as a state office employing two part-time staff assistants who together provide full coverage in the staff assistant position. A shared employee, on the other hand, is employed by multiple offices (e.g., a financial administrator who handles the vouchers and payment processing for five House Member offices). House Members are allowed a total of four personnel slots for part-time employees, shared employees, temporary employees, employees on leave without pay, and paid interns.

FLEX CAREERS

ARRANGEMENT	DESCRIPTION	BENEFITS	EXAMPLES
Career Lattice	Moving up, down or sideways in the organizational hierarchy or taking positions with more, less or lateral responsibility while still maintaining a long-term career plan with your employer	<p>Allows you to “step back” or “step ahead” or “step sideways” as your personal or family responsibilities or career desires change</p> <p>Provides broader experiences and perspectives</p> <p>Reduces burnout and builds skills</p>	<p>Declining a promotion</p> <p>Reducing hours for a period of time</p> <p>Making a lateral move</p> <p>Moving from one district/state office to another (either in the same position or a different one)</p> <p>Increasing your time or responsibility</p>
Cross-Promotion Between DC and District/State Offices	A district/state staffer is interested in pursuing a position in the DC office, or a DC staffer is interested in moving back to the district/state	<p>More accurately aligns the staffer’s position with their interests and skills</p> <p>Each office benefits from the staffer’s knowledge and perspective (e.g., the DC office gains additional knowledge of district/state and further insight into district/state operations, the district/state office gains firsthand knowledge about Capitol Hill and additional insight in legislative and policy process)</p> <p>Improves interoffice relations and communications</p>	<p>A Field Representative becomes a Legislative Assistant; the District/State Director becomes the Chief of Staff; a Legislative Assistant becomes a Caseworker/Constituent Service Representative</p> <p>Changing the position’s location to better meet personal or organizational goals (e.g., basing the Communications Director or Scheduler in the district/state rather than DC)</p>
Sabbaticals¹²	Taking an extended leave from work for the purpose of recharging, studying or experiencing new things	<p>Builds skills</p> <p>Improves creative thinking</p> <p>Helps you reexamine old routines</p>	Typically any extended leave from four weeks to six months for travel, volunteering, learning, research, goal attainment, personal growth, innovation
Phased Retirement	Gradually reducing your hours as you approach retirement	<p>Reduces your work hours rather than an abrupt retirement</p> <p>Provides a higher income than if you leave entirely</p>	<p>Part-time work</p> <p>Seasonal or part-year work</p> <p>Job sharing</p> <p>Project work</p>

12 For House Members, the number of personnel slots available may determine whether a staffer on sabbatical is removed from the office’s payroll or is placed on leave without pay (“LWOP”), which continues their benefits. LWOP status has specific requirements and limitations, which are outlined in the *Members’ Congressional Handbook*, accessible from the Committee on House Administration at: <http://cha.house.gov/handbooks/members-congressional-handbook#Members-Handbook-Leave-LWOP>

WORKFLEX STORIES

Tara Oursler, Chief of Staff, Rep. C.A. Dutch Ruppersberger (D-MD)

What are some of the strategies or tactics your office has tried to help staff better manage their work and home life?

We offer generous paid sick, annual, and maternity/paternity leave. We also offer work-life options such as occasional telecommuting and compensatory time. We have one staffer who didn't want to commute to Washington every day, so we divided her work responsibilities between the district and Capitol Hill so she can work in our local office a few days a week. We allow employees on maternity/paternity leave the option of taking their leave all at once, or returning for a few days a week to ease the transition.

Employees that observe religious holidays that do not coincide with federal or national holiday designations are encouraged to take leave to observe them. All employees are granted bereavement leave if a family member or loved-one passes. The congressman has employed two people with long-term illnesses in the office, allowing them to take time off as necessary for medical appointments. Employees are guaranteed their positions at the same salary when they return from medical leave.

We also offer flexible schedules for employees working on their education. We currently employ three staffers who are pursuing degrees or advanced degrees and some work varying hours to accommodate night classes. A management-level employee recently took six weeks off to study abroad in Germany.

All of these opportunities for staff present some issues for the office, but when the culture is one of teamwork and we are all in this together, staff seem happy to help out a fellow employee.

Excerpted from: "Life in Congress: Aligning Work and Life in the U.S. House and Senate," A Joint Research Report by CMF-SHRM.

WORKFLEX VOICES

"The biggest challenge [to congressional work-life], in my opinion, is resistance from senior staff, who see it as an abuse. Younger staff seem to be more open and see it as a requirement for employment."

—*Senate Chief Clerk*

3

Common Concerns About Workflex

In the first section, we outlined a number of benefits of different types of workflex for employees and employers. That said, both of these groups have concerns about workflex and its effects on individuals and organizations that must be addressed. This section discusses how to overcome common concerns. We encourage congressional managers and staff to review this entire section to understand all the perspectives involved with workflex and to develop workflex solutions tailored to their particular circumstances.

3A. Employer Concerns About Workflex

CONCERN #1

The Member/Senator will never go for it—staff must be available to them at all times. The congressional workload and job requirements don't allow for these types of arrangements.

SOLUTION

We all agree that the congressional schedule is demanding and can be unpredictable—this comes with the territory when working in Congress. It's expected that deadlines, workloads, and events will give many staffers late nights and long weekends. However, there is also a traditional mindset that staff must be seen to prove they are working. To that we would say: presence does not equal productivity! In today's world, technology enables us to be accessible at almost any place at any time. Other times, it's not the Member who is driving staff to stay late or become overworked, but staffers themselves. A common occurrence in many offices is the staff's desire to be seen as hard workers, so if one person needs to stay late, others will likely do so as well, regardless of whether they're needed.

CMF has interviewed several House and Senate offices who are successfully utilizing workflex (a few are highlighted in this toolkit in "Workflex Stories"). Two trends we have noted: flexible or family-friendly policies are coming top down—they have the Member's buy-in—and staff retention is a top priority. Talk to your colleagues about their experiences: How are they making their workplaces more flexible? What benefits have they realized? What issues have they faced and how did they address them? And, don't forget to employ one of the most persuasive strategies utilized in Congress: encourage your Member to talk with other Members!

For those unsure of how workflex could work in your congressional office, we encourage you to review specific areas of this toolkit:

- **Benefits:** The data showing the benefits of workflex in Chapter 1 may be particularly helpful in discussing this topic with Members. If employee benefits aren't convincing enough, the employer benefits in Section 2C are also worth reviewing.
- **Workflex Options:** When many people consider workplace flexibility, they think of telecommuting, but workflex is much more varied than that. The table in Section 2D outlines the various forms workflex can take and the benefits of each. See if any of these options would be appropriate for your situation or for someone in your office.
- **Communication:** Frequent and regular formal and informal communication is key to successful workflex. The components in Section 5A discuss how to determine your communication and technological needs in a flex arrangement, while the table in Section 6A will help you draft a communication plan.
- **Try it Out:** Nothing is forever when it comes to workflex. Even if you're doubtful, try a workflex option for a trial period (Section 5B), and make adjustments as you go to get the right arrangement for you (Section 5C).

CONCERN #2

I'm concerned about giving preferential treatment/treating all employees equally.

SOLUTION

We would distinguish between treating staff equally and treating staff fairly or equitably. Employees have different needs and are likely interested in different workflex options depending on their job position, goals, and personal situation (e.g., what works for a caseworker in your state office may not work for a legislative assistant in DC). What you want to avoid is applying your workflex policies inconsistently, or being perceived to apply them inconsistently. One of the ways you can prevent this is to be clear in your office policies and in your discussions with staff about the factors that you will use in determining workflex, such as the job position/requirements, employee work styles, and how these interact with the office's goals and priorities. Having established guidelines helps ensure everyone is on the same page and makes managing expectations easier and implementation fairer.

CONCERN #3

How will I know that staff are being productive/aren't abusing the arrangement(s)?

SOLUTION

Many managers are concerned about staffers abusing workflex, and communication and accountability are key to a successful arrangement. We encourage the manager and employee to work together to agree upon performance metrics to ensure the staffer is accountable. These metrics should reflect the type of workflex the employee is engaged in. For example, if the staffer is working at home to have uninterrupted time to catch up on their constituent mail, then it is simple enough to get an update on the number of responses drafted or the number of letters edited and reviewed. If a staffer is moving to part-time or seeking a compressed workweek, work with them to set measurable objectives, such as weekly or monthly goals, to determine their effectiveness.

If you are doing performance management well in your office, a transition to a workflex environment will be easier for you and your staff. First, you will have already established clear performance metrics and annual goals for your staff, which can then be modified for this new arrangement. Second, you will already be communicating with your staff regularly on their performance.

If you are not engaging in ongoing performance management, we highly encourage you to do so. Many times congressional managers believe that the staffer's performance goals are clear to them, but in reality the staffer doesn't feel that way. According to previous CMF-SHRM research,¹³ while 70% of congressional staff reported that "communication between employees and senior management" was very important to them, only 22% were very satisfied with this aspect. Additionally, 58% of staffers said that "recognition by management about their job performance" was very important, but again only 22% were satisfied with this aspect. Performance management goes beyond annual staff reviews—staff should receive ongoing and regular feedback from their bosses on their performance and how well they are meeting their goals. For additional information on how to implement a performance management program, please visit www.CongressFoundation.org or review CMF's *Setting Course* or *Keeping It Local* management guidebooks.

CONCERN #4

We're a small organization. How can we make this work?

SOLUTION

As stated in Chapter 6, "In successful workflex cultures, employees and supervisors find ways to work together to improve both individual and organizational performance. It takes a positive team attitude, strong work ethic, clarity around job expectations and a LOT of communication." In particular, Sections 6A-6C discuss strategies that are especially important for small organizations, such as building team relationships, managing expectations, and improving communication.

This toolkit is based on decades of workflex research with the U.S. workforce and of the Congress, but we also recommend that you talk with other congressional offices. Sometimes, hearing first-hand from your colleagues who are facing similar personnel and operational issues can make a world of difference.

3B. Employee Concerns About Workflex

CONCERN #1

I don't think workflex would be available for the kind of work I do.

SOLUTION

This is likely the most common obstacle we hear from congressional staff, due to the demands of the congressional environment and the need to be available to their Member of Congress and to constituents at all times. However, we believe that ALL jobs can be designed to create a better work-life fit. As shown in section 2D, there are many options for workflex—it's likely many are listed in this table that you haven't previously considered.

On the other hand, not every job is appropriate for certain types of workflex all the time. A legislative assistant may not be able to telework full-time, but it's possible they could do so occasionally. In particular,

13 "Life in Congress: Job Satisfaction and Engagement of House and Senate Staff," Congressional Management Foundation and Society for Human Resource Management, September 2013. <http://www.congressfoundation.org/lic/job-sat-engagement>

we know of congressional offices who have successfully used options such as reduced hours, compressed workweeks, flex time, and uninterrupted time. We encourage offices to at least try some of these arrangements, even on a temporary basis. It's important to note that employee needs are different, so what works for one staffer may not be suitable for another. Employee and organizational needs may change over time so be sure to revisit your arrangements regularly, especially when circumstances change.

If your office is supportive of workflex, but your current job doesn't provide the flexibility you're looking for, ask about other positions in the organization that do. These job transitions may be uncommon in congressional offices, but they do happen—especially for experienced employees. Talk with your supervisor and create a plan to develop the skills and experience you'll need to transition into a new role. If this isn't possible and you are unable to get the flexibility you're looking for, you may need to redesign your career plans.

CONCERN #2

My employer (or my supervisor) won't be supportive of workflex.

SOLUTION

It's true, some supervisors aren't supportive of workflex, and some Members of Congress likely won't be supportive either. But more often than not, it's because they can't understand how it could work in their office or because they've had a bad experience. It may not be directed toward you, but out of concern for the office's performance.

If this is your situation, you have a few options. You can do some research (find case studies online, talk to other congressional staff who are successfully implementing workflex) and show your supervisor how others have made it work. Make a business case, showing how workflex will help your office. Help problem solve. Review the employer concerns outlined in the previous section to understand where they are coming from, and how you can alleviate their concerns. Or, ask for workflex on a trial basis to assess how it can work best.

Of course, you can look for another job that offers more flexibility. But before you do, speak frankly with your supervisor about your work-life needs, share options that could benefit the office and you, and give him or her a chance to help.

CONCERN #3

I'm worried about the impact on my career advancement if I choose workflex.

SOLUTION

Some employees are hesitant to ask for workflex because they fear it will make them look like a "slacker" and hurt their career prospects, particularly in the "get-ahead" environment on Capitol Hill. In reality, employees tend to find they are more productive when they are working flexibly—due to better focus, reduced work-life stress or reduced commute time.

Unfortunately, many workplaces—Congress included—are still resistant to workflex. If your supervisor is not truly supportive, choosing a flexible work schedule could limit your career possibilities. You may be passed over for promotions or specific work assignments. You will have to determine for yourself whether you can have both a thriving career and workflex within your workplace.

If you decide to go for it, keep in steady, consistent communication with your supervisor about your performance. Make it clear that you want to move ahead. Volunteer for special projects or assignments to show that you are engaged in the organization. Share your performance achievements and ask for

continuous feedback. Work with coworkers to ensure your availability when necessary and demonstrate your commitment to the team through ongoing collaboration. Chapter 6 of this toolkit provides some tips for workflex success.

If workflex isn't already an acceptable practice in your office, you may become a role model for others to have the courage to work this way, and ultimately, an agent for change.

CONCERN #4

What if I want a different workflex option later on?

SOLUTION

You will probably find that your desire and need for workflex will change throughout your career. For example, you may need short-term emergency time off or longer-term leaves at various points in your career. You may want to dial your career up or down—sometimes working a traditional schedule, other times working part time or flexibly. Likewise, your office may have different needs over time too, such as the Member deciding to pursue a leadership position or deciding to expand their presence in the district/state. In addition, your office may add new ways of working flexibly to what it offers.

Once you demonstrate to your office that you can work successfully with one kind of workflex, you'll probably have an easier time negotiating new arrangements as your needs change.

CONCERN #5

Will workflex impact my income?

SOLUTION

Unless you are reducing your hours, there is no reason to suggest (or accept) a pay cut as part of a workflex arrangement. If your full-time work status remains unchanged, your productivity should also remain the same (or improve). So long as you are doing the same amount of work, your compensation and benefits coverage will remain unaffected.

Working a reduced schedule, however, will affect your pay. Find out if reducing your hours also will impact your benefits. Cutting your hours may impact your eligibility for health care coverage, student loan repayments, retirement plan participation and other employer-provided benefits. Contact the appropriate institutional and support offices in your chamber to fully understand the specific impact of your workflex arrangement for the short and long term before you make it official (see the Appendix for a listing of institutional offices to consult).

If you are considering going part time or taking a career hiatus, recognize that you may experience long-term financial implications (e.g., reduction in Social Security benefits), and be aware that taking a break from the workforce—or even ramping down to a lower pressure position—can also reduce your future earning potential. Salary and benefits are often based on years of experience, putting people who “step back” professionally at a possible wage disadvantage.

However, as the old cliché goes, money isn't everything! A trade-off between compensation and flexibility is worth it for many employees. There's no right or wrong decision—only what makes the most sense for YOU.

WORKFLEX STORIES

Susan Wheeler, Chief of Staff-DC, Senator Mike Crapo (R-ID)

As a manager, what are the benefits to having family-friendly or more flexible policies in place for your staff?

The easiest benefit to point to is that we have been able to retain staff for longer tenures, which means we have a lot of institutional memory and experience. I've been here for 20 years, beginning when Sen. Crapo was a congressman in the House. Our legislative assistants are averaging 4-5 years, some of our administrative and support staff worked for our predecessors, and we have state staff that have been with us for 10+ years.

A specific example is that we had one staffer who left after six years to be a stay-at-home mom. Later she decided that she'd like to work part-time, and we had an opening that worked for part-time. She worked for us for another 7-8 years, rather than leave outright because we were flexible. We've had staff with child care issues and we looked at that issue in a way that helped them, usually by being flexible on their hours. We've found that the employee has performed as well if not better than if they were working regular hours.

Excerpted from: "Life in Congress: Aligning Work and Life in the U.S. House and Senate," A Joint Research Report by CMF-SHRM.

WORKFLEX VOICES

"I have learned to not make plans Tuesday–Thursday nights, or before key legislative deadlines. It's very hard for friends/family to understand why I am expected to be at the office if nothing is happening ... sometimes it's hard for me to understand that as well."

—Senate Legislative Director

4

Assessing Whether Workflex is Right for You

Once you have reviewed the various concerns employees and employers typically have regarding workflex, and how they can be overcome, it's time to assess whether workflex is right for your office or situation. In this chapter we discuss additional considerations for managers, such as how open your office culture is to workflex and the work styles and habits of those considering workflex options. We provide assessments that congressional managers can use—alone or with staff—to determine if and when workflex can work for your office.

4A. Culture of Flexibility

What do we mean by “how open the culture is to workflex?” In a culture that is very supportive, employees regularly and openly work flexibly so that they don't have to choose between advancing in their jobs and devoting attention to their family or personal lives. In a workflex supportive culture, workflex is the way the organization does business, so employees may be less likely to suffer negative career consequences for using flexible arrangements.

The culture of flex varies by organization. Here are four different ways that some approach workflex:

1. **Formal flex** cultures tend to offer workflex arrangements governed by written organizational policy and/or an employment contract. Formal workflex arrangements are often tracked by office administrators.
2. **Informal flexibility** is a less systematic way to offer workflex. These organizations may not have a policy that explains the options available or the process for requesting flexibility. In this case, workflex arrangements may be arranged unofficially between the staffer and the office. In some informal flex organizations, workflex isn't formalized because it's just become the way work gets done and is considered normal. In others, workflex arrangements may be more quiet or private in nature.
3. **Occasional flex** usually doesn't require anything more than a request of a supervisor when something arises and the employee needs flexibility to address it (e.g., working from home when a repair technician is expected, taking the afternoon off to attend a doctor appointment, care for a sick child, etc.).

4. **Regular flex** refers to an ongoing, planned workflex arrangement between an employee and employer, such as when an employee has flexible start and stop times or works from home on Tuesdays. By arranging a consistent schedule of flexibility, the employee, their coworkers and their supervisor(s) are able to plan on the staffer's ongoing flexibility and arrange meetings, events, and projects based on the staffer's schedule.

What types of flex exist in your office (formal, informal, regular, occasional or a mix)? How does the current culture fit with your office's strategic priorities and the values of your office? One note of caution for managers as you consider your office's flex culture, particularly if you have identified a mix of flex cultures in your office: you want to be particularly sensitive to applying policies inconsistently or appearing to apply policies consistently. As discussed in Section 3A, managers will want to establish and communicate clear guidelines on the workflex options available in your office and ensure you are treating employees fairly.

4B. Organizational Considerations

In addition to assessing your current office culture, congressional managers should also address the following "big-picture" questions prior to setting up specific workflex arrangements. As needed, managers may want to discuss these questions with staff:

- What are your office's strategic goals and priorities? What values does your Member want to promote within your office and among your staff?
- Are you currently conducting ongoing performance management practices/meetings with staff? Is it clear to them what their job responsibilities are and what their performance goals are?
- What are the Member's attitudes and the office needs which would contribute to, or detract from, a workflex environment? Is the Member knowledgeable about workflex options, or have they previously worked in a job environment where workflex existed?
- What are the Member's views on staff turnover and retention? Do you have an office culture that values staff and seeks to retain them as long as possible? (Or, does your office consider staff replaceable and view high turnover a natural part of working in Congress?)
- Do you have any existing workflex policies in your office manual?
- Is anyone in your office already working flexibly? If so, are there other staffers who would be interested in these options? If not, who would have reason to support a more workflex friendly culture?
- If your office has attempted workflex in the past, was it successful or did it create challenges? What strategies or practices might you leverage for success in the future?
- If there were challenges, what were they? How did you deal with them? How might you address those concerns or prevent similar problems in the future (e.g., extra communication, new technology)?
- Have you ever managed someone working flexibly? If so, was the experience positive or negative?

4C. Employee Assessment

When determining which workflex option(s) would be most appropriate for specific staffers, managers may want to assess the employee's work style, performance, and habits. The following statements can be shared

with staff as you engage them in discussions on workflex, and you may wish to have them complete this assessment if they are considering workflex options. When reviewing their situation, you can then discuss areas in which your assessments aligned, and where there might be differing perspectives. Consider this an opportunity to have a constructive dialogue with your staff.



THE STAFFER CONSIDERING WORKFLEX:

Manages work responsibilities by planning ahead.

Manages work responsibilities by prioritizing what's important.

Regularly meets deadlines.

When work problems arise, problem solves and resolves issues independently.

Is focused and productive when working.

Communicates well with supervisor and keeps him/her informed.

Scored "satisfactory" or better on last performance evaluation.

Is a team player.

Communicates well with coworkers and keeps them informed.

Understands how the office does or could benefit from workplace flexibility.

Is prepared to meet the level of availability and responsiveness required to meet the needs of the office.

Understands the results that they are responsible for.

Understands that flexibility also must work for their coworkers, their supervisor and the office.

If you agreed or strongly agreed to most of these statements, then the staffer likely has the organization, time management and communication skills needed to work flexibly. If you disagreed or strongly disagreed with these statements, then you and the staffer should look for ways to improve their communication and focus, such as through coaching, goal setting, or classes that will improve their ability to organize and manage their work. If your assessment was mixed, then you may want to consider a trial period of workflex. Review with the staffer which areas they can improve, and provide ongoing feedback as you begin workflex. Keep communication channels open as you proceed and ask the staffer to demonstrate how workflex is helping them be more effective and productive.

WORKFLEX STORIES

Susan Wheeler, Chief of Staff-DC, Senator Mike Crapo (R-ID)

Any advice for other offices as they consider modifying their employment practices to provide more flexibility to staff?

Often we manage by the clock, but the way we operate now with technology, this shouldn't be the case. I go home with a BlackBerry and I'm checking e-mails throughout the times when I am out of the office, and often so are my staff. Staff need to be available for the senator—that's part of what you sign on for when dealing with legislation—but we also need to consider the staff. Is it fair? Do we need to make some sort of compensation for them? Do they feel they've been recognized for their hard work?

Also, we don't want people to feel that they're punching the clock to demonstrate their value. Sometimes you might work six hours a day, and the next might be 10. We try to accommodate this flexibility in both D.C. and in the state so that all staff is considered. Being flexible and open to alternate arrangements is one of the biggest stumbling blocks to work through as a manager, because I think a lot of offices are afraid of being burned by their staff.

We approach it this way: both sides want to be treated fairly and not be taken advantage of. We pay attention to work hours to make sure that we are being fair, and that on their end, employees are still being productive. We know that staff may have to take care of personal items during work hours because sometimes that is the only time they have available. We allow staff flexibility in when they take their breaks or lunch so that they can utilize this time for personal needs. As long as they don't abuse it, the policy works well for all.

Excerpted from: "Life in Congress: Aligning Work and Life in the U.S. House and Senate," A Joint Research Report by CMF-SHRM.

WORKFLEX VOICES

"As the primary care-giver for a toddler, I have the ability at my office to work from home most days. That option enables me to be a more effective employee and parent by allowing me flexibility in my work hours."

—*House Caseworker/Constituent Services Representative*

5

Setting Up and Adjusting Workflex

In the previous chapter, we provided tips for managers on assessing office culture and employee work styles and performance. Now it's time to outline how to set up workflex in your office, and how to adjust the arrangement(s) as necessary. The following information will walk managers through the components and issues you should address in a workflex arrangement.

5A. Components of a Workflex Arrangement

Show careful consideration when crafting a flexible work arrangement. Consider the impact on the Member, your office, team and other internal stakeholders. Flexible work arrangements must not negatively impact the productivity of others; ideally, workflex will enhance them. They must support the office's strategic goals and must be responsive to changing organizational needs (e.g., project deadlines, training, coworker illness, etc.). Consider the nature of the staffer's job, how flexibility could help them achieve their current and future goals, and what support systems are available. Consider the advantages and obstacles, and try to address them before proceeding with the arrangement. The components on the following page address these ideas in more detail and can be used to draft a workflex arrangement. Keep in mind that workflex must meet the needs of both the employee and employer. If employee or business needs change, managers may need to adjust some components of the workflex arrangement, as advised in the next sections. Additional guidance on how staffers can work to make workflex successful is included in the next chapter.

If adopting workflex arrangements in your office, managers should also consider incorporating these components in your office's employee handbook, clearly stating your office's policy on how these arrangements are made. As stated previously, it is critical that managers make workflex decisions consistently, using a fair and equitable process that relies on neutral and objective criteria. Not only is this transparency prudent from a management perspective, but from a legal perspective as well. Finally, when crafting a specific arrangement with an employee, document the agreed-upon arrangement in writing and keep a copy in the staffer's personnel file.

I. BENEFITS

- How will workflex benefit the office? How will it benefit the staffer? (In other words, what is the business case for this workflex arrangement? How can it address office needs and concerns (for more engaged employees, etc.)?)
- How will the goals of the office be positively or negatively impacted by this proposed workflex arrangement?

II. WHEN AND WHERE

- What type or types of workflex is the staffer interested in?
- How long does the staffer/office plan to work the arrangement(s)?
- What hours and days is the staffer proposing to work and from what location(s)?

III. AVAILABILITY

- Are there specific hours that the staffer must be present to accomplish their responsibilities?
- Will they be able to continue to meet deadlines and be available for critical situations?
- Can the staffer make arrangements to be onsite for location-specific activities?

IV. IMPACT ON COWORKERS/CONSTITUENTS/OUTSIDE GROUPS

- How will others who depend on the staffer receive what they need to accomplish their work?
- Who will be most impacted by this flexible schedule?
- Will this improve service in any way?
- What would have to change in order for this to work for the staffer and the office?

V. COMMUNICATION

- Will communication with the Member, coworkers, supervisors and constituents differ once the staffer is on a flexible schedule?
- How will people know how and when they can reach the staffer?
- What communication tools will the staffer/office employ to connect?
- What are reasonable boundaries that will work for the staffer and the office in the short- and long-term?

Note: Additional guidance on creating a communication plan is in the next chapter.

VI. PERFORMANCE

- What are the staffer's performance goals this year?
- How will the staffer meet or exceed their job expectations in this new flexible arrangement?
- How will the staffer's supervisor know they are getting the work done?
- How and when will the office and the staffer assess the effectiveness of this arrangement?
- What performance measures should be used to demonstrate success?

VII. CONNECTIVITY (FOR TELEWORKERS)

- Does the staffer have reliable high-speed Internet access?
- Does the staffer have a phone service/plan that can accommodate lengthy conference calls?
- Does the staffer/office have the equipment/technology to work offsite or will you need to invest in new tools?

Note: The House and Senate have specific rules concerning telecommuting, including the use of equipment, security guidelines, and what expenses may be considered reimbursable. Prior to setting up this type of arrangement, please review your chamber's policies and contact the Committee on House Administration or the Senate Committee on Rules and Administration (see the Appendix for information).

5B. Trial Period

If you are reluctant to make a long-term commitment to a workflex plan, you may want to begin with a three- or six-month trial period. Agree to a specific time frame as well as the metrics you will use to evaluate the success of the arrangement. Build in an ongoing review process so that you can make changes to the arrangement as problems arise. It's important to understand that no one—neither the Member, Chief of Staff, nor staffer—is signing on to a “forever” situation, because organizational and personal needs change over time. It's also important to accept that the staffer or the office (or both) may need to make adjustments as you try to find an arrangement that works for all parties involved. Following are some questions that can help managers assess how the office is handling workflex:

1. How is the arrangement working overall? Are we experiencing any problems with communication, collaboration, or scheduling?
2. Are we meeting our office goals or on track to meet our goals?
3. How is the staffer performing thus far? Are they getting enough facetime with and feedback from their supervisor(s) and their colleagues?
4. Is workflex causing any difficulties between the DC office and district/state office(s)?
5. Are there specific issues I can address as a manager (e.g., clarify the arrangement with the rest of the staff) or that we should address as a team?

5C. “Flexible” Workflex

When crafting a workflex arrangement, managers should work with staff to have more immediate back-up plans in place so that adjustments can be made in response to the office's rapidly changing needs. For instance, could the staffer put their flex schedule on hold for a day to cover for a sick coworker or attend a meeting? Plan for and discuss these contingencies to determine how “flexible” staff can be with their workflex schedule. Being rigid in flex requirements can send the wrong message. While staffers should be encouraged to set boundaries and remind others of their schedule, sometimes they'll need to adjust their schedule to respond to the needs of the office. Try to be creative and consider the full variety of workflex options available when dealing with new situations. Being adaptable when crafting office arrangements sends a strong message that both parties recognize flex is a two-way street and are willing to work together so that workflex is a win-win.

5D. Blackout Dates and Suspensions

Some organizations implement blackout dates when workflex options are temporarily suspended due to heavy workloads. Ideally, these blackout dates are predictable and communicated to employees well in advance. In Congress, this situation may arise during heavy legislative activity (for DC-based staff) or during recess periods (for district/state-based staff). Workflex suspensions may also be appropriate during special circumstances, such as when voting on weekends, or when the office is severely understaffed. Rather than terminate workflex because of workload or for staffing reasons, consider a temporary suspension until business demands level out. You may not think of workflex as a seasonal or part-year option, but workflex options can be fluid and responsive to changing organizational needs.

5E. Terminating Workflex

The reality is that employers are not legally obligated to provide workflex options¹⁴—even if staff have worked flexibly in the past or other employees in similar positions work flexibly. And while managers should attempt to give reasonable notice when changing office workflex policies or arrangements, there is no clear legal precedent requiring it. However, we would advise that congressional managers and staff discuss the possibilities at the outset of the arrangement. How much time would each of you consider “reasonable notice” to make a long-term schedule adjustment?

If you find that the office must terminate a workflex situation, managers should work with the staffer to determine an appropriate resolution. Can the staffer transition back to their previous work situation, or is there an alternative workflex option that would be available and appropriate? After the decision to end the flexible work arrangement has been made, work with the staffer to develop a transition plan and notify coworkers and other appropriate parties of the change in arrangement.

14 Under the Americans with Disabilities Act (ADA), as applied by the Congressional Accountability Act (CAA), an employing office is legally required to provide reasonable accommodation, if needed, to an employee or job applicant with a disability—unless doing so would cause significant difficulty or expense for the employing office. Reasonable accommodations may include providing a flexible or modified work schedule or other workflex arrangement. When providing workflex to employees, employing offices may be setting a precedent that could impact their obligations under the ADA/CAA. There may also be some legal implications when terminating a workflex arrangement. Managers may wish to consult with their chamber’s employment counsel (listed in Section A2 of the Appendix) prior to discussing a workflex termination with a staffer.

WORKFLEX STORIES

Tara Oursler, Chief of Staff, Rep. C.A. Dutch Ruppersberger (D-MD)

How did you develop your workflex policies?

I worked for the congressman when he was county executive for eight years and the staff structure was a traditional, top-down hierarchy. This type of organizational structure worked for me, but I quickly found that younger people on our congressional staff were looking for a better work-life balance. They also don’t want to be tied to a desk.

At first, I was nervous. Is staff going to take advantage? Will they be able to make good judgments when there is a gray area? I have been astounded at the ability of staff to make solid decisions that ultimately benefit the office as well as their own personal lives. I’ve learned that employees take tasks more seriously when they can manage their own time. Understanding what challenges our colleagues are dealing with in their personal lives allows us to set more realistic expectations as to when a project may be completed and how they may communicate with us.

As long as the congressman gets what he needs in a timely fashion (which, of course, they all understand) the flexible policies are successful.

Excerpted from: “Life in Congress: Aligning Work and Life in the U.S. House and Senate,” A Joint Research Report by CMF-SHRM.

6

Flex Success Strategies for Staff

In the previous two chapters, we offered assessments and guidance for managers to consider for the successful implementation of workflex. In this chapter, we discuss strategies employees can utilize to make their workflex successful: solid communication skills, the ability to self-pace and work independently, good problem-solving skills and a sense of accountability. In successful workflex cultures, managers and staff find ways to work together to improve both individual and organizational performance. It takes a positive team attitude, strong work ethic, clarity around job expectations and a LOT of communication.

The sections that follow include best practices for staffers to employ as they begin a workflex arrangement.

6A. Communication

When developing flexible work arrangements, it's important for staff to determine when, where and how you will be available to your supervisor, coworkers and customers (internal and external). Talk about how accessible you need to be when you are not physically present at work. Clearly, there are personal issues, as well as business ones, to consider. Use the questions on the following page as a guideline, and then review with your supervisor to create a communication plan.

Creating a Workflex Communication Plan

HOW AND WHEN TO REACH YOU	Complete ✓
Decide if and how you will be accessible when you are not in the office. Take others' needs into account when you consider these decisions.	
Decide when you will be available for calls—which days, what hours? Are there specific hours when you must be available? Are there specific hours when you can't be available? What will you do when others must reach you?	
Inform others on how and when you can be reached (cell phone, home phone, email, etc.).	
OUTSIDE GROUPS/INDIVIDUALS	Complete ✓
Consider all of the contacts you have outside your office that may be impacted by your workflex arrangement (such as constituents, agency contacts, vendors, other Hill staff, etc.) and discuss with your supervisor the potential impact on these organizations and individuals. Decide whether or not to notify these groups and individuals of your workflex arrangement.	
If appropriate, determine the best way to communicate to these outside groups and individuals when, where and how you can be reached, and who can assist them in your absence.	
If there are new or additional colleagues with whom these outside groups and individuals will be working, set up a meeting to make introductions.	
MEETINGS	Complete ✓
Agree with your supervisor on when staff meetings will be scheduled.	
Identify some contingency plans in the event a meeting is called on short notice.	
Decide if and how you will be available for meetings on days when you are not working (e.g., in person, via phone or video conference).	
INFORMATION	Complete ✓
Inform your team members where critical information is kept (e.g., filing system, computer access, addresses and contact information, your calendar).	
Make sure necessary computer files are shared with others who might need access to them.	
If you are working away from your worksite, determine how you will access information you might need.	
FEEDBACK	Complete ✓
Encourage your supervisor, coworkers, and others to give you feedback on how the new work schedule is working for them.	
Establish regular check-in meetings with your supervisor—either face-to-face or through phone conferences, so you can talk about what's working, what's causing challenges and how to resolve them.	

6B. Building Team Relationships

As we talk about communication, you may be thinking about logistics, status updates and all the necessary information exchange that goes into getting work done. But for workflex arrangements to be successful, staff communication needs to go beyond your supervisor. You need to build and maintain relationships with your coworkers as well.

In a traditional workplace, it's easier to build bonds as you greet each other in the hallway every morning or chat around the coffee maker. Those incidental interactions may seem small, but they go a long way toward building essential connections.

If you are working a reduced schedule, you may feel too rushed (or too focused) when you are at work to take time out for small talk. Attention to your work is important, of course, but if you avoid connection with coworkers over the long term, your effectiveness may suffer.

If you are a teleworker, you will have to be even more deliberate about building team relationships. If possible, arrange to spend some time at work—at least a couple times each month, or every few months, depending on your situation. Face-to-face interaction is the easiest way to build those interpersonal connections. If for some reason you can't make it to the main workplace for an in-person visit, consider video conferencing options. While not the same as being in the office in-person, having face-to-face conversation via video can be a tremendous help. (We also encourage it to improve the communication and relationship between the DC and district/state offices!)

Remember, relationships are integral to team effectiveness and communication is at the core of teamwork.

6C. Working as a Workflex Team

In the past, flexible work was seen as an accommodation or a perk and was something negotiated between an individual employee and his/her employer. But those ideas are rapidly changing. In many of today's forward-thinking workplaces, workflex is part of a team work style. Everyone works together to create a work environment that supports everyone's work preferences and schedule needs. Here are some questions that will help you assess how you and your colleagues are managing in a workflex environment.

Workflex Check-In Questions

1. Have I missed any opportunities or deadlines as a result of workflex? Am I meeting my weekly/monthly performance goals?
2. Is my workflex arrangement creating an extra burden for any of my coworkers?
3. Is communication and access to information working well, or do we need to make adjustments? Am I getting enough facetime with my supervisor(s) and my colleagues?
4. How is my workflex situation being perceived? Are there any negative comments based on issues I can proactively fix (e.g., better communication about my availability or performance, or the need to build stronger relationships with each other)? Are there any positive comments that I should make sure my Member, Chief of Staff, and others hear about?

6D. Managing Expectations

As someone well-versed in constituent service, you already know how important it is to manage expectations. That means delivering on your promises, ensuring deadlines are met and monitoring customer satisfaction.

Successful employees do the same thing with their internal customers (supervisors, coworkers) at work. For flexible workers, who may be under extra scrutiny, managing these expectations is particularly important. If your assumptions about your job responsibilities and performance don't match with your supervisor's or your coworkers', your career could take a hit.

When managing expectations with your supervisor and coworkers, you need to build transparency and clarity around your responsibilities and performance. Here are a few tips:

- **Find Measurable Results:** Look for ways your job responsibilities can be measured. Work with your supervisor to retool your job description in a way that identifies results and the outcomes you need to achieve. Best case scenario, those results will be measurable or quantifiable in some way and it will be clear to all involved whether those results have been met or not. For example, instead of “conduct outreach,” your outcomes could be “connect with 15 stakeholders this month.”
- **Define Objectives:** Whenever you take on a new project, be sure to clearly identify your objectives. Repeat back to your supervisor what you understand your role to be. And don't be afraid to share with your team members what you need from them to get the job done, and encourage them to tell you what they need to do their job as well. Review priorities and deadlines and talk about what to do if a project isn't going according to plan.
- **Communicate:** For long-term projects, plan to communicate status updates. If your team doesn't use project-tracking software, you might consider flash reports. Flash reports are quick daily or weekly updates that outline a) what you accomplished, b) what you're going to tackle next and c) what you need from your team members to move forward. Always be upfront if it looks like you're going to miss a deadline, so the team can prepare or find a solution.
- **Be Realistic:** Above all, don't promise more than you can realistically deliver. If you consistently underestimate how long a project will take, build extra time into your estimate. Or, make a habit of tracking your activity so that you have records you can refer to when setting deadlines for future projects.
- **Know Your Record:** If you're able to put measurements in place, you will always know how well you're performing against expectations. If you can't find metrics for your particular role, you'll need to get deliberate about performance check-ins. Have a regular dialogue with your boss on performance standards. You also might want to ask your peers how you're doing.

6E. Staying Visible and Promotable

Right or wrong, employees who work flexibly may be under extra scrutiny or may have less visibility and be overlooked: “out of sight, out of mind.” Work with your supervisor to set clearly defined, measurable benchmarks and agree on expectations so that you can demonstrate success.

Clearly communicate your capacity to take on work, both your limits and your ability to expand your responsibilities. Something as simple as sending weekly updates, even unsolicited, demonstrates you are actively working toward organizational goals and achieving results.

Recognize that flexibility is a two-way street requiring both employees and supervisors to be adaptable. If your regular day off is Friday, but the office is hosting a staff celebration, you may want to make the extra effort to switch your day off that week and join in.

On the flip side, many flex employees need to consistently, and politely, remind coworkers of their schedule, since coworkers don't always remember. Be clear about your inability to make a meeting if your schedule conflicts, and rather than taking it personally, accept that it may take some time to "bring them up to speed."

Post your calendar on the door to your workspace and include your work-from-home days or days off. Better yet, put this information in a shared calendar so everyone can keep track of each other.

6F. Setting Boundaries

In today's work culture, the line between our personal and professional lives can get pretty blurry. This can be a particular challenge for flexible workers.

Perhaps you've carved out some personal time during traditional office hours, but need to monitor voicemail and email in case an emergency arises. This can quickly lead to a scenario in which you're "always on"—you're connected to the office and working, even though you've planned to be away. For some people, this continual switching between work and personal obligations is a seamless, comfortable process. For others, it creates feelings of overwork and exhaustion.

Be realistic about your energy patterns and workload. Work with your supervisor to set appropriate boundaries. Perhaps you don't need to check email when you are away from the office, but your team will call you if a serious issue arises. Work with your family too to set boundaries about work time and distractions, particularly if you will be working at home.

Conclusion

While this toolkit offers many options to congressional offices seeking to introduce workflex policies, many barriers still remain. Perhaps the greatest challenge is not an objection from a manager or Member of Congress but a culture and work environment that is slow to adapt. Congress also employs a workforce that, while extraordinarily engaged in their mission, sometimes can be muted in advancing their own interests. Staff are taught from Day One that only the boss's interests are relevant, not employees.

Yet organizational cultural changes can occur if approached slowly, methodically, and with the right goals in mind. This booklet demonstrates that workflex options are more than just offering an employee teleworking, and that new ideas are being experimented within the American workplace every day. Readers should also come away with an understanding that workflex is not a one-size-fits-all concept—identifying creative options for different employees and offices is an essential component. Finally, the authors hope that the examples provided demonstrate that workflex policies do not wreak havoc on discipline and effectiveness. On the contrary, through a thoughtful and measured approach, offices can ease workflex policies into employees' and managers' routines.

As Congress continues to tighten its own budget, options for employee recruitment and retention will continue to shrink. Congress will face competition for a highly skilled workforce and will need to stay competitive through innovative policies. This need will only increase as millennials become the bulk of the congressional workforce—a generation that has placed aligning work and life as a higher priority than previous generations. We've seen Congress innovate with technology and communications in the past two decades. It now appears to be headed towards another innovation—adapting its work environment to a 21st century American workforce. As this booklet has demonstrated, those offices which take up this challenge will likely see the benefits of a more effective, more experienced, and more engaged workforce.



Appendix A: Resources

Here we provide a brief overview of additional resources to assist you in your workflex planning. Some of these resources are management guides and tools and related publications, such as previously published “Life in Congress” reports, while others are the key institutional and support offices you should contact for advice. Note: this toolkit is not a substitute for legal guidance on employment law, so we highly recommend that you contact the appropriate offices in the House and Senate, as applicable.

A1. Related Information

Life in Congress: Aligning Work and Life in the U.S. House and Senate

This CMF-SHRM report focuses on how House and Senate staff manage work and life issues and is based on a survey of more than 1,400 congressional staff. It offers an inside look at the workloads of congressional staff and their struggles in managing the multiple demands of work, family and personal responsibilities. Available at: <http://www.congressfoundation.org/lic/aligning-work-life>

Life in Congress: Job Satisfaction and Engagement of House and Senate Staff

This CMF-SHRM report, also based on the survey of 1,400 congressional staff, reveals what House and Senate staffers value most about their workplace. It includes a breakdown of responses by employee job categories, and comparisons to data collected by SHRM on the U.S. workforce. Available at: <http://www.congressfoundation.org/lic/job-sat-engagement>

Life in Congress: The Member Perspective

Work-life fit isn't just a struggle for employees. This CMF-SHRM report focuses on the job of Members of the House of Representatives from the legislator's perspective. It offers the first view of the challenges lawmakers face in managing the demands of constituents, interacting with colleagues, overseeing a staff, and still having a home life. Available at: <http://www.congressfoundation.org/lic/member>

When Work Works Award

The Award is part of **When Work Works (WWW)**, a research-based initiative which highlights how effective and flexible workplaces can yield positive business results and help employees succeed at work and at home. Since 2005, When Work Works has been recognizing model U.S. employers of all types and sizes for their best practices. In addition to the recognition of earning an award by Families and Work Institute (FWI) and the Society for Human Resource Management (SHRM) in national media, When Work Works' Community Partners recognize winners in their communities by hosting local events. Employers interested in a free, 15-minute assessment based on the Award criteria can also take the Workflex Assessment at: <http://www.whenworkworks.org/workflex-assessment>.

Workflex Employee Toolkit

This toolkit, the basis for this document “Workflex Toolkit for Congress,” offers employees a blueprint for making workflex a reality in their careers, and it provides a realistic perspective on what workflex options are possible for the companies that employ them. It features real-world advice and guidance from workplace experts including self-assessment tools; direction on how to ask for workflex; and how-tos on making it work once implemented. It's a valuable workflex resource for every worker and manager striving for flexibility at work. Available at: <http://www.whenworkworks.org/be-effective/guides-tools/workflex-employee-toolkit>.

The Effective Workplace Brochure

Effective workplaces recognize that employees are an organization's greatest resource and make a critical difference in the organization's ability to not merely survive, but to also thrive. To be truly effective, a workplace—its design, practices and policies—must benefit both the organization and its employees. When an organization takes this approach to employee development and management, you have employees who are highly engaged, satisfied and plan to remain with the organization. Effective workplaces don't all look the same because they go beyond “industry best practices” to #ReinventWork around their employees' needs as people and professionals, regardless of the job. In some organizations, this means flextime and remote work, while for others, it's about shift scheduling and control over breaks. Effective workplaces guide employees to success through good management and opportunities to learn and make better decisions on and off the job. Although effective workplaces take many different forms based on industry, business strategy and workforce demographics, Families and Work Institute has identified six employee-based measures that signify whether an organization is an effective workplace. A summary of these measures is located at: <http://www.whenworkworks.org/be-effective/guides-tools/effective-workplace-brochure>.

A2. Key Institutional and Support Offices

To ensure you are following the laws, regulations, and rules of your chamber, please consult the following offices as appropriate. In addition to contacting them using the information provided, many also have resources on the intranet of their chamber: <http://housenet.house.gov> or <http://webster.senate.gov>.

Committee on House Administration	202-225-8281 (Republicans) 202-225-2061 (Democrats) http://cha.house.gov
Office of the Chief Administrative Officer (CAO)	First Call Customer Service Center: 202-225-8000 Information Technology Call Center/House Information Resources: 202-225-6002 Payroll & Benefits: 202-225-1435
Office of Compliance (OOC)	202-724-9250 http://www.compliance.gov
Office of Employee Assistance (OEA)	202-225-2400 or 1-866-831-0038 employee.assistance@mail.house.gov (general inquiries only)
Office of House Employment Counsel (OHEC)	202-225-7075
Senate Chief Counsel for Employment	202-224-5424
Senate Committee on Rules and Administration	202-224-6352 http://rules.senate.gov
Senate Disbursing Office	202-224-3205
Senate Employee Assistance Program	202-224-3902
Senate Sergeant at Arms (SAA) Office Support Services	202-224-0821

Life in Congress

A Research Series on Members and Staff



WHEN
WORK
WORKS



A PARTNERSHIP BETWEEN

