



# ON DEMAND GOVERNMENT

Deploying Flexibilities to Ensure Service Continuity

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PARTNERSHIP FOR PUBLIC SERVICE

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## EXECUTIVE SUMMARY

One can only imagine the disruption to vital federal government services if terrorists detonated a “dirty” bomb in Washington, D.C., and brought the nation’s capital to a standstill, or if an influenza pandemic spread across the country and indefinitely kept tens of thousands of civil servants quarantined and away from their offices.

The federal government’s ability to protect the nation’s security and meet essential public needs would be undermined if these or a wide range of other unexpected and uncontrollable events kept employees off the job for long periods of time—making it imperative that the government be prepared to continue effective operations under all circumstances.

Such preparation must include a robust policy that builds teleworking—the ability to work from home or from a remote location—into the fabric of the civil service as one means of helping ensure the continuity of government operations during times of crisis.

This may seem simple enough. Rapid advances in technology have made working from a remote location much easier and more efficient than ever before, and there has been a growing consensus that telework has a number of significant economic benefits for the government and work-life advantages for its employees.

Yet to date, all of the talk about the desirability of telework in government has led to insufficient progress and action.

The Partnership for Public Service and Booz Allen Hamilton examined the current state of teleworking and four other flexible work arrangements—compressed workweeks, flextime, part-time schedules and job sharing—to better understand their use in the federal government today, to identify the impediments being encountered and to determine what approaches will be most effective to removing barriers.

We have concluded that if all the talk about telework is to be translated into concrete action, the government must take a different approach—an approach that will change the current mindset of managers, set aggressive goals, start with the premise of “yes” and ensure that teleworking can be effective during a crisis.

The federal government must begin operating on the assumption that all employees are eligible to telework

unless managers can demonstrate why it is not appropriate, a shift from the current practice that tends to put the onus on the workers and accepts inconsistent standards across the government.

The government also must set aggressive targets for teleworking and not be satisfied with small incremental advances. The Obama administration has set a goal of having 150,000 employees teleworking by 2011, a positive first step. We propose a goal of 600,000 federal civil servants teleworking by 2014.

To meet aggressive targets, government managers must embrace a different outlook. Currently, managers tend to view telework as an employee perk, rather than a smart business practice that can save money on overhead, provide better citizen services by extending hours and ensure continuity of operations during regional or national emergencies. They also tend to wrongly assume physical presence equals strong performance, often because better performance measures are not available to them.

Moreover, the ability to work remotely must be viewed as a national security imperative, and that capacity should be tested regularly so that agencies can analyze their capabilities, shore up weaknesses and ensure telework is fully incorporated in all agency continuity of operations plans.

Overall, our study found that that the federal government, once a leader in teleworking and other work flexibilities, has clearly lost its momentum and, to its detriment, is significantly underutilizing some of these important tools.

Here are the facts.

- According to the government’s own data, less than 6 percent of all full-time federal workers telework even one day a month—just 102,900 federal employees of the 1.9 million on the government payroll when the federal survey was conducted in 2008.
- Agencies inconsistently implement telework programs, with wide discrepancies in use, approaches and technologies across the federal government.
- Although the number of teleworkers increased slightly in 2008, annual government surveys show

a consistent drop in teleworking from 2004 through 2007. The number peaked at 140,694 in 2004 but plummeted to 94,643 in 2007.

- Job sharing and part-time schedules are rarely used in the federal government. As of September 2009, 3.3 percent of federal employees worked part-time and .02 percent job shared. Comparable data currently do not exist for compressed workweeks and flex schedules, although to the government's credit, agency work-life coordinators assert that participation rates in these programs are high and have been successfully embedded in the federal work-life culture.
- Only 44 of 78 agencies, or 56 percent of federal organizations, have integrated telework into their formal continuity of operations planning—a crucial element needed to make sure essential employees can support agency missions and meet important public needs during a natural disaster or a crisis such as a terrorist attack or a pandemic.
- Due to the underutilization of telework, part-time work and job sharing, the majority of federal agencies are missing out on the opportunity to reap savings on real estate, infrastructure, basic operating costs and energy usage, and to improve their business processes and increase productivity. The Patent and Trademark Office has proven this can be done, savings millions of dollars on office expenses and creating the capability to add more than 1,000 examiners a year without adding extra real estate or parking facilities.
- Few federal agencies make use of flexible work arrangements as a strategic tool to recruit and retain top talent, or to broadly help employees balance family and work obligations, and reduce lengthy commuting times and transportation costs.

Our study found that a number of factors are impeding the use and growth of teleworking in the federal government, including management resistance, cultural and organizational barriers, and technology and information security concerns.

A survey released by the Office of Personnel Management (OPM) in 2009 revealed that about half of the federal agencies cited management resistance as a barrier to the use of telework, a theme that was prevalent in our extensive discussions with work-life coordinators,

teleworkers, thought leaders, union officials and senior executives.

As a general proposition, government managers were concerned about limited productivity and inaccessibility of teleworkers; the potential for abuse; a lack of accountability; and the absence of personal interaction. In addition, our study found that some managers were simply unaware of workplace flexibilities, including the job sharing option.

We also found that some employees were uneasy about the lack of face-to-face contact with their managers when teleworking. Furthermore, in most agencies, eligibility for telework is determined either by position or by individual, creating confusion and even resentment when some employees see their colleagues teleworking while they are not eligible themselves.

Another barrier centered on technology, with agency officials citing concerns about teleworkers using unsecured networks and access to classified information in non-secure locations. An additional technological barrier to telework has been the lack of a clear policy about who provides equipment and services.

Agencies can and have overcome these roadblocks. Organizations such as the Patent and Trademark Office (PTO), the Defense Information Systems Agency (DISA) and the Nuclear Regulatory Commission (NRC) have set an example by implementing pilot programs, addressing security barriers and expanding telework to improve the way they conduct business and serve the public.

Both Congress and the Obama administration have recognized the benefits of workplace flexibilities and currently are taking steps to increase the use of teleworking.

Legislation in the House and Senate, for example, would make substantive changes in telework eligibility, use, training and continuity planning. The administration, meanwhile, has a short-term plan to increase the number of teleworkers, and OPM has begun a pilot project with its own workforce that is allowing 400 staff members to individually determine where and when work will be accomplished.

While these are important efforts, much more can and should be done. Based on our review of the literature, extensive interviews, focus groups and analysis of survey data, we recommend that:

- The federal government should significantly increase the use of teleworking, setting an ambitious goal for half of the nearly 1.2 million eligible federal employees, or about 600,000 civil servants, to be engaged in telework by 2014 in order to match the private-sector companies with strong and effective telework programs. To achieve this goal, government-wide guidance is needed. All employees should be eligible to telework unless a supervisor or manager can demonstrate why an employee is not eligible. Each agency with fewer than 50 percent of its eligible employees teleworking should develop an action plan with annual updates to achieve the goal.
- OPM should determine an appropriate goal to spur an increase in the number of part-time and job sharing opportunities and encourage agencies to inform employees these options are available.
- Congress should approve legislation to increase the strategic use of telework in federal agencies, create a framework to boost the number of employees eligible to telework, and place responsibility in the hands of senior leaders for coordinating telework activity. The key elements in any final bill should include telework's role in agency mission continuity plans, collaboration between agencies, the role of the telework managing officer and clear reporting requirements, telework definitions and participation guidelines.
- Agencies must link telework to mission continuity plans. Unexpected events and emergencies have proven that telework can be an effective way for agencies to continue to operate during a crisis, and all agencies, regardless of whether Congress approves pending telework legislation, should incorporate telework into their continuity plans.
- The General Services Administration (GSA), as part of its facility and long range master planning services for federal agencies, should advise agencies on how to reduce their real estate footprint through telework. The Office of Management and Budget (OMB) should require that an agency's use of teleworking and remote offices be reflected in all construction project or facility expansion budgets, and should require agencies to strategically assess how remote office use can reduce the need for permanent space.
- Agencies must solve the information security challenges, including developing secure telework architecture and authentication solutions, and addressing other technical issues related to employees working from remote locations. The Federal Chief Information Officer (CIO), located in OMB, is ideally positioned to bring together top agency officials and thought leaders on information security.
- Senior leaders must set the tone within their agencies and ensure that those participating in flexible work arrangements are held to the same performance standards—no more and no less—as their colleagues who do not participate in such programs.
- OPM should monitor and evaluate agency flexible work arrangement programs to obtain a complete picture of how these approaches are being used across the entire government. In addition, key metrics should be used to assess and improve individual flexible work arrangement programs at the agency level by documenting the impact and benefits, and identifying issues that need correction.

The most recent data from OPM show that although 62 percent of federal employees are eligible to work remotely, less than 6 percent of all full-time federal workers telework even one day a month.

## INTRODUCTION

The Washington, D.C., metropolitan area was paralyzed by two winter storms in February 2010 that left more than three feet of snow on the ground and caused the shutdown of federal offices throughout the region. Nevertheless, operations continued at many agencies because thousands of people were able to telework from home, including 5,300 workers from GSA, 4,400 patent examiners and attorneys from the PTO, 1,200 employees from DISA, and others.

Across the country, federal agencies must cope with conditions that disrupt their work—tornadoes, earthquakes, floods, road closures, power outages and protests. Federal agencies also face the possibility of other serious threats, including pandemics or terrorist attacks, that could isolate the government workforce and render federal and regional infrastructure inoperable.

Teleworking is essential to maintaining the continuity of government operations and the delivery of services in times of crisis. It also can save the government money. Although the initial productivity loss as a result of closing the government last winter in the nation's capital was estimated at \$100 million per day in salary costs, OPM Director John Berry later reduced that figure to \$71 million per day, in part to account for employees who teleworked during the storm.

Aside from the value of flexible work arrangements to help the government periodically cope with extraordinary situations, there is a compelling business case for the regular use of increased telework and other work flexibilities, including compressed workweeks, flextime, part-time schedules and job sharing. When strategically deployed, flexible work arrangements provide a wide range of benefits for the government and its employees, and should be part of a strategy to help government recruit and retain top talent and contribute to building an engaged workforce.

Workplace flexibilities lead to economic efficiencies, including cost savings on real estate, infrastructure and energy usage, and improve how agencies deliver citizen services. Teleworking and other flexibilities also can help improve employee performance, job satisfaction and work-life balance, and decrease the costs of commuting by getting employees off the road on scheduled days of the week or by allowing for nontraditional hours that can result in shorter commutes. On a broader societal basis, telework creates an opportunity to relieve

traffic congestion and reduce auto emissions that pollute the environment.

Given the importance and benefits of work flexibilities, the Partnership for Public Service and Booz Allen Hamilton examined work arrangements that are being used in the federal government, whether there are impediments to adopting these workplace practices, and how they can be expanded and made more effective.

We studied five flexible work arrangements (compressed workweek, flextime, part-time work, job sharing and telework); conducted a literature review of more than 200 articles, publications, guidelines and policies; held focus groups with federal work-life and telework coordinators, teleworkers, managers and federal executives; surveyed telework and work-life coordinators; and interviewed agency officials, work-life and telework thought leaders from the private and non-profit sectors, federal executive associations and labor union officials.

### Flexible Work Arrangements (FWA) Our Research Scope

#### Flextime

Consists of workdays with both core hours and flexible hours. Core hours are the designated period of the day when all employees must be at work. Flexible hours are the part of the workday when employees may (within limits or "bands") choose their time of arrival and departure.

#### Compressed workweek

Typically allows the bi-weekly basic work requirement of 80 hours to be scheduled over fewer than ten workdays (for full-time employees). An example is a four-day, ten-hour-per-day workweek.

#### Job sharing

Allows two or more part-time employees to fill one position.

#### Part-time work

Allows a permanent employee to work 16-32 hours each week on a prearranged schedule.

#### Telework

Allows an employee to regularly perform work from a remote location.

This report outlines the current state of flexible work arrangements in the federal government and seeks to provide a roadmap to foster these important workplace initiatives. It is the first of a three-phase examination of flexible work arrangements. In the second phase, we will evaluate telework support for mission continuity using a “stress test” of remote access capabilities at one or two federal agencies. The third phase will be a flexibilities pilot that will also be done in cooperation with federal agencies.

### Flexible work arrangements Yesterday and today

Despite the many obvious benefits, our study found that the government’s efforts fall far short of what is needed to make flexibility a dynamic part of federal work-life. Although the federal government was once a leader regarding work flexibilities, it has been slow to embrace teleworking despite all of the rapid technological advancements in the past decade, and has placed barriers in the way of other work flexibilities.

The government’s history with flexible work arrangements began in the 1970s with small, agency-specific pilot programs. In 1982, Congress passed the Federal Employees Flexible and Compressed Work Schedules Act that authorized each executive agency and military department to establish programs to allow flexible and compressed work schedules for employees.

Teleworking initially began to attract attention in 1990 when the President’s Council on Management Improvement created a task force led by OPM and GSA to design and implement the first federal telework project. A year later, Congress included language in an appropriations bill that required an evaluation of telework’s impact at the Department of Transportation and the Department of Energy. Subsequent legislation authorized the creation of telework centers and reporting requirements. In 1994, President Clinton signed an executive order for a Family Friendly Workplace that directed agency heads to consider opportunities for workplace flexibility.<sup>1</sup>

In October 2000, Congress passed the first government-wide telework legislation (Public Law 106–346). The law required all federal agencies to implement telework policies and charged OPM to ensure that telework requirements were applied to 25 percent of the eligible federal workforce by April 2001 and to an additional 25

percent of eligible federal employees during each subsequent fiscal year, a requirement that government has dramatically fallen short of meeting.

The most recent data from OPM shows that although 62 percent of federal employees are eligible to work remotely, less than 6 percent of all full-time federal workers telework even one day a month—just 102,900 federal employees of the 1.9 million on the government payroll when the survey was conducted in 2008.<sup>2</sup> Agencies inconsistently implement telework programs, with wide discrepancies in use, approaches and technologies across the federal government. Job sharing and part-time schedules—like telework—have not been embraced by federal managers, although flextime and compressed time are more widely used in federal agencies.

Today, telework is generating renewed legislative interest, in part because earlier laws and government efforts have fallen short, and because advances in technology have made it easier and more reliable.

Congress is now considering legislation that would result in sweeping changes to telework eligibility, lead to extensive training and assign responsibility to senior management for agency telework planning and coordination, information security and continuity of operations issues and reporting requirements. Lawmakers in the House and Senate hope to reconcile the differences in the two measures and send a final bill to the president for his signature this year.

Separately, the Obama administration’s 2011 Budget and Performance Plan stated a high priority goal will be to increase the number of eligible federal employees who telework by 50 percent over the 2008 baseline of 102,900 employees.

In addition, OPM Director Berry this year initiated an innovative pilot program, the OPM Results-Only Work Environment (ROWE), with the participation of 400 OPM staff. The pilot is designed to allow individual employees to decide where and when work will be accomplished. The experiment has been adapted from private sector practices that began at the retail chain Best Buy, and is operating from the premise that employees will be evaluated only on performance outcomes.

The heightened congressional and administration interest in teleworking is encouraging, and OPM’s ROWE pilot program sends a signal that there is a desire to foster workplace flexibilities. These efforts are an ac-

1 Wendell Joice, *The Evolution of Telework in the Federal Government*, February 2000.

2 United States Office of Personnel Management, *Status of Telework in the Federal Government*, 2009.

knowledge of the reality—that the world of work is changing and that technology, societal needs and the new demands on government mean the government must adapt and be willing to rethink **when, how and where work is done**.

Simultaneously, there is an opportunity to rebuild the federal workforce as baby boomers retire and a new generation of skilled civil servants becomes ready to tackle the complex challenges of the 21st century. Flexible work arrangements can contribute to making our government a better workplace, and to better serving the American people. It is an opportunity that we should not squander.

## FLEXIBLE WORK ARRANGEMENTS ARE NOT BEING EFFECTIVELY UTILIZED IN THE FEDERAL GOVERNMENT

A 2009 WorldatWork survey reported that only 17.2 million Americans,<sup>3</sup> or 11 percent of the nation's public and private sector workers, teleworked in 2008.<sup>4</sup> Separate survey data from the Society for Human Resource Management (SHRM) show that only 11 percent of all employers offer job sharing and just 30 percent either formally or informally allow flextime outside of the core business hours.<sup>5</sup>

By merely offering an array of flexibility options to its employees, the federal government at first appears to stand out as a leader. But the truth is that telework and other flexible work arrangements are greatly underutilized in the federal government.

OPM reported in October 2009 that less than 6 percent, or 102,900, of the 1.9 million federal employees in 2008 worked offsite at least once a month.<sup>6</sup> Sixty-four percent of these employees teleworked between one and three days a week. Participation rates in telework programs vary by agency. While all agencies surveyed reported having some employees who teleworked, only a handful took full advantage of the practice, and the majority had low participation rates.

Although the number of employees working remotely rose slightly in 2008, annual government surveys show a consistent drop in teleworking from 2004 through 2007. The number peaked at 140,694 in 2004 but fell to 94,643 in 2007. Although the OPM reports remain the most reliable source of data on teleworkers, some telework coordinators attribute the drop in the numbers to unintentionally inflated reporting in earlier years. In either case, the number of teleworkers is small given the size of the federal workforce.

Table 1 shows the wide variability in telework use among eligible employees at Cabinet-level and independent federal agencies. The PTO led the way with a high percentage of eligible employees teleworking at 82.7 percent. The Department of Defense (DOD) and

the Department of Homeland Security (DHS), have the lowest percentages of eligible employees who were teleworking at 3.0 percent and 2.5 percent, respectively. Yet DISA, an organization within DOD and a featured case study in this report, has developed a strong telework program with a secure information technology system. This example shows that while Cabinet-level departments may have a low percentage of teleworkers, specific agencies within the department may have different usage numbers.

Job sharing and part-time schedules also have been rarely used in the federal government. As of September 2009, 3.3 percent of federal employees worked part-time and .02 percent job shared. Comparable data currently do not exist for compressed workweeks and flex schedules, although agency work-life coordinators assert that participation rates in these programs are high. Since they have been successfully embedded in agency work-life culture and are so widely used, the extent of their use is no longer measured.

According to our survey of agency telework and work-life coordinators, only 57 percent discuss flexibility options during employee orientation and even fewer, 46 percent, mention flexible work arrangements in their employee handbooks. About 61 percent mention flexibility on their websites.

Our research also found that as a general proposition, senior agency leaders across the government are not explicitly supporting telework and work-life programs by providing resources to sustain them or encouraging their use. Senior leaders are the best ambassadors for flexibility when they emphasize and put resources behind work-life arrangements.

There have been some exceptions, particularly with agencies such as the NRC and the PTO initiating innovative pilot programs and using these experiments to expand telework within their organizations.

Overall the data suggest—with some notable exceptions highlighted in our case studies—that the federal government is missing the opportunity to make substantial use of telework, job sharing and part-time schedules.

3 WorldatWork, *Telework Trendlines*, 2009

4 According to the Bureau of Labor Statistics, there were nearly 154 million Americans in the civilian workforce as of March 2010.

5 Society for Human Resource Management, *Workplace Flexibility in the 21st Century*, 2009

6 United States Office of Personnel Management, *Status of Telework in the Federal Government*, 2009

**Table 1** Eligible employees who teleworked in the federal government in 2008

Agency	# of Eligible Employees	% of Eligible Employees		
		Teleworking	Teleworking 1-2 Days/Week	Teleworking 3 Days/Week
Patent and Trademark Office	5,314	82.7	46.1	36.6
General Services Administration	10,374	45.8	39.7	2.3
Securities and Exchange Commission	3,671	43.5	12.8	2.9
National Science Foundation	1,438	41.0	12.6	0.5
Office of Personnel Management	2,357	34.2	18.6	7.5
Environmental Protection Agency	16,337	32.1	19.6	<0.1
Department of Transportation	22,528	29.8	8.5	3.9
Federal Deposit Insurance Corporation	5,194	27.4	6.1	1.3
Federal Energy Regulatory Commission	1,417	24.0	16.8	0.0
Department of Housing and Urban Development	8,100	23.8	19.2	2.8
Department of Interior	45,319	23.7	11.9	3.7
Social Security Administration	14,557	23.6	19.7	1.7
Department of Health and Human Services	59,158	21.6	12.5	1.0
Department of Veterans Affairs	20,455	20.3	6.4	6.6
Department of Education	3,825	10.4	8.3	1.2
Department of Labor	15,136	10.4	3.5	1.0
Department of Commerce	35,130	8.5	4.4	0.2
Department of State	14,207	7.1	3.0	0.3
Department of Agriculture	87,432	6.4	2.4	0.6
Department of Energy	13,231	5.7	2.7	0.3
Department of the Treasury	96,652	5.6	2.5	1.5
Department of Justice	37,023	4.7	2.1	1.3
National Aeronautics and Space Administration	18,224	4.5	1.5	0.7
Department of Defense	564,562	3.0	1.4	0.3
Department of Homeland Security	54,875	2.5	1.1	0.4

Source: *Status of Telework in the Federal Government*, 2009 (Note: OPM's 2009 telework report did not include data from members of the Intelligence Community.)

### In many federal agencies, telework is not strategically aligned to continuity of operations planning

Working remotely is an important component of continuity of operations planning (COOP), because it enables essential employees to continue their work during disasters or disruptions.

Despite telework's value in supporting an agency's mission during serious disruptions, only 44 of 78 agencies, or 56 percent, have integrated telework in their formal COOP planning.<sup>7</sup> Federal leaders need to be concerned about this omission. It is too late to evaluate employees' capacity to work remotely when an unexpected crisis occurs.

Including telework in COOP plans is only the first step to ensure mission continuity during a disaster.

Agencies that have telework programs strategically aligned to continuity plans also regularly practice for emergencies by allowing essential personnel to work from remote locations. Practicing for a COOP situation means testing the ability of information technology systems to operate under stress, and conducting telework exercises to ensure employees have the resources and skills to work remotely. Successful agencies conduct exercises with all employees, not just those deemed essential, because crisis situations may require all employees to work remotely.

Our research found widespread discrepancies in how telework's support of mission continuity was implemented and tested. One agency indicated that offices within the headquarters were not allowed to telework except during COOP exercises, which meant that tele-

<sup>7</sup> United States Office of Personnel Management, *Status of Telework in the Federal Government*, 2009

## Federal Case Study The Calm Before, During and After the Storm at DISA

During the February 2010 snowstorm in the Washington, D.C., region, the Defense Information Systems Agency (DISA) was able to continue to carry out its mission because of its well-established telework operation. Over the past three years, DISA has equipped 70 percent of its workforce in the Washington, D.C., area with laptops and virtual private network connections that allow them to connect to the agency's unclassified networks. DISA's telework program allows eligible employees to telework a maximum of three days per week on a regular basis with supervisory approval.

DISA implemented a telework program four years ago to maintain its mostly Virginia-based workforce during the consolidation of offices to a new headquarters in Fort Meade, Maryland, slated for October 2010.

The main goals of DISA's telework program include:

- Facilitate the Base Realignment and Closure (BRAC) relocation to Fort Meade;
- Improve employee productivity, retention and recruitment; and
- Ensure continuity of operations during emergencies.

Since its inception four years ago, DISA's telework program has:

- Reduced workplace interruptions, increasing employee focus to get the work done;
- Enhanced employee job satisfaction and quality of life, according to an internal DISA survey;
- Established the ability to remain productive during emergency situations;
- Mitigated the commuting issues attributable to BRAC relocation; and
- Enabled teleworkers to meet and even exceed expectations.

### KEYS TO SUCCESS

#### “Test driving” telework

DISA chartered a telework “SWAT” team—led by a senior human resources manager and senior IT manager—to provide critical guidance and expertise to ensure the program was up and running within 90 days. DISA also required eligible positions to telework in order to ensure training, tools and permissions were in place in case of emergencies.

#### Integrating telework into the performance management system

DISA uses the employee's performance plan that outlines measurable results to assess teleworker productivity in addition to soliciting customer and manager feedback.

#### Providing equipment needed for telework

DISA provides 90 percent of its workforce with laptops to work at home and reimburses employees for half of the initial subscription cost and monthly fees for Internet access at home.

#### Leveraging automation

DISA employs an automated system that includes a complete safety checklist, the days an employee wants to telework, attendance tracking and the number of telework requests approved or denied.

work was not a standardized part of the organization's structure for conducting its business. Other agencies had telework programs, but did not tie the flexible work arrangements program to mission continuity. In some of these examples, teleworkers expressed concern—and some filed grievances—when they were expected to work during February's inclement weather while their non-teleworking colleagues were given a day off from work.

The February 2010 snowstorm in the Washington, D.C., area necessitated that thousands of essential and non-essential federal employees work from home, providing agencies with the chance to test IT systems. Test results varied. Agencies with advanced telework programs, such as GSA and DISA, continued to operate smoothly. Other agencies with less mature telework programs had

IT challenges. This office shutdown underscored the importance of testing to ensure that agency operations can continue during emergencies.

### Flexible work arrangements offer significant business benefits, but few agencies are using them to maximize results

Few agencies capitalize on the positive impact that comprehensive flexible work arrangements can have on the way they do business and provide services to the American public.

Our interviews and focus groups indicate that only a handful of federal agencies fully take advantage of teleworking, and a majority of agencies lack an understand-

### **Federal Case Study** For Patent and Trademark Office, Telework a “No-Brainer”

Faced with rising real estate expenses during the late 1990s, the Patent and Trademark Office (PTO) needed a creative way to cut costs and reduce physical infrastructure. The solution was a telework initiative that provided flexibility to employees and a way to save money. The PTO’s telework initiatives are among the most mature in government, winning awards and recognition from the federal government and private sector organizations.

#### **KEYS TO SUCCESS**

##### **Pilot programs**

To address high real estate costs, the Trademark division of the PTO implemented the first telework pilot in the late 1990s. The Patent division soon followed with a work-at-home pilot in 2001. Soon thereafter, the PTO set up a telework program for supervisors. Some participants in the supervisors’ pilot managed at least one employee in the work-at-home pilot, creating a vested interest between both parties to make the arrangement work. The pilot programs led to the creation of a permanent telework initiative in both Patents and Trademarks. Numerous additional telework programs from one day per week to as many as four days per week (hoteling) have been implemented over the past 10 years throughout the PTO.

##### **Training all teleworkers**

To prepare the patent examiners to work remotely, a training lab was set up offering a two-week training course. The training lab featured workstations with the exact equipment employees would use at home. The training course featured two days of practice during which employees worked from home with the equipment they would use permanently. The course also included simulations of real-life technology problems to train employees on how to troubleshoot minor issues themselves without having to contact the agency’s IT help desk.

##### **Providing the right equipment**

The PTO provided all of the equipment teleworkers needed to complete their work outside of the office. Computers featured a collaboration suite (including voice conferencing, desktop sharing, whiteboard tools and videoconferencing). The same collaboration tools were provided to both teleworkers and non-teleworkers to ensure seamless use. In the case of a major equipment failure, the Patent Office used FedEx to send replacement equipment to the teleworker. The PTO also picked up most of the tab for high-speed Internet service for its teleworkers.

ing of how telework and other flexible work arrangements could allow them to improve their operations, save money on office space and equipment and integrate workforce policies into their overall business plans. Instead they are looked upon solely as an employee benefit. A recent SHRM study of public and private sector organizations found that “employee requests” was the reason most cited for offering flexibilities.

In contrast, the most mature agencies—including those featured in case studies throughout this report—are examples of organizations that have maximized economic benefits through strategic implementation of flexible work arrangements.

One senior federal official recently described a pending proposal at his agency to use telework and flexible work hours to expand direct service to citizens. His agency currently provides service from 9:00 a.m. to 5:00 p.m. By allowing employees to work evenings and from their homes, his proposal could extend service hours to 10:00 p.m., a 62 percent increase in coverage hours. In this executive’s view, such service expansion will be made possible by technology solutions that will allow secure, protected information to be accessed safely and remotely.

Flexible work arrangements also can save significant amounts of money for organizations. Cost savings can result from many factors, including the reduced use of physical office space, reduced need for geographic moves and travel, greater use of online training and savings achieved when employees remain working and productive during times of facility closure.

In the federal government, estimates for providing office space for the typical federal employee run as high as \$10,000 or more annually.<sup>8</sup> Permanent change of station costs range from \$150,000 per move to as high as \$250,000 per move (under the appraised value program).<sup>9</sup>

By using sound business decisions, telework has enabled the PTO to avoid spending an additional \$11 million in the purchase of new office space.<sup>10</sup> The PTO’s ability to hire 1,000 employees each year without adding brick

<sup>8</sup> Wainhouse Research LLC, “Telework and the U.S. Federal Government Tipping Point,” August 2008

<sup>9</sup> Interview with Office Director, Office of Environmental Management, Department of Energy; May 7, 2010.

<sup>10</sup> United States Patent and Trademark Office, *Telework Annual Report*, 2008

and mortar offices or parking facilities is a testament to the importance of teleworking in the organization's business culture.<sup>11</sup>

Additionally, the Treasury Inspector General for Tax Administration (TIGTA) has saved an estimated \$1 million annually since it introduced telework.<sup>12</sup> Both organizations use a "hoteling" concept that allows employees to bring their equipment into the office only when necessary. The PTO provides hoteling suites throughout their facility. TIGTA allows employees to reserve workplaces through an automated reservation system. At TIGTA and the PTO, real estate savings drove the expanded use of telework.

Some agencies have used incentives to make telework easier and affirmatively create conditions for cost savings. The Federal Deposit Insurance Corporation's (FDIC) telework Internet stipend, for example, ensures that teleworkers receive a small annual payment to help offset the cost of home Internet services.

TIGTA reimburses the installation cost of the service and up to half of recurring charges associated with working from home, including the cost of high-speed Internet service. In turn, TIGTA employees use issued equipment with pre-programmed firewalls, anti-spyware and antivirus software. Employees know that in order to work in alternative locations, they must conduct research in their area to determine available broadband solutions. TIGTA has built a business model that outlines telework configuration.

Other agencies use innovative approaches to invest in telework technology by reducing office space costs. For instance, when select Internal Revenue Service (IRS) regional offices decided to reduce their space footprints, one half of the savings were invested in telework technology. Agencies have identified potential savings when regular teleworkers are no longer provided duplicative computer systems (i.e., a desktop computer plus a laptop for teleworking). Some agencies find that employees work more hours on days when they telework because of the time saved during commuting hours.

### Some organizations outside the federal government also offer good examples for what can be accomplished

The Great Place to Work Institute's "100 Best" study shows that the 99 companies with flexible work policies consistently outperformed the overall Standard & Poor 500 in retaining key talent.<sup>13</sup> Some private-sector companies have also realized dramatic cost savings by reducing their facility infrastructures, business travel, and geographic relocations, resulting in significant business returns on investment.

One prime example in the private sector is IBM, which in 1993 incorporated the concept of mobility into an extensive reorganization and a major rethinking of the way the company was doing business. The company was burdened by an outdated physical facilities infrastructure and identified several reasons for moving to a mobile culture, including a reduction in real estate and energy costs and an improvement in employee morale and recruitment.

On any given day, more than 115,000 IBM employees around the world go to work, but not in an IBM office. Forty percent of the IBM workforce operates without a dedicated office space. In fact, the employee/desk ratio is currently 4:1, with plans to increase the ratio to 8:1 in field locations. An employee portal enables the virtual organization to work. One hundred percent of employees have access to desktop applications from almost any location.

IBM's return on investment for flexible work arrangements is impressive and well documented. IBM calculates that it saves \$450 million per year in reduced facility infrastructure and associated initiatives through telework. Benefits are dramatic, including cost savings of \$75 million a year in reduced infrastructure, \$284 million a year in savings associated with online learning, sweeping improvements in online collaboration and information technology, and recruitment of top talent without geographical constraints.

Since the inception of a mobile culture, IBM tracks extensive metrics as part of the flexible work arrangement program, resulting in managers being able to effectively differentiate initial investment costs, such as equipment purchases and network modifications, from long-term potential for savings.

<sup>11</sup> Wainhouse Research LLC, "Telework and the U.S. Federal Government Tipping Point," August 2008

<sup>12</sup> Wainhouse Research, *Telework and the U.S. Federal Government: At the Tipping Point*, 2008

<sup>13</sup> Institute for a Competitive Workforce, *Workplace Flexibility: Employers Respond to Changing Workforce*, Winter 2008.

While there are other examples of best practices in the private sector—including Booz Allen Hamilton and Deloitte—and among some federal agencies, our government as a whole is falling short when it comes to using flexible work arrangements to maximize the business benefits.

talent represents an opportunity for the government, one that should no longer be ignored.

### **Federal agencies are missing out on using flexibilities for recruitment and retention of employees**

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Interviews with work-life experts and our focus groups with agency work-life coordinators indicate that many federal agencies do not use flexible work arrangements as a strategic tool to attract and retain talent. Additionally, the strategic human capital plans of many federal agencies do not address flexibility programs as a way to meet the talent needs of the organization.

With thousands of federal employees eligible to retire and our government in critical need of specialized professional skills, it is a critical time for federal agencies to change the way flexible work arrangements are viewed, from being seen as an individual benefit to a strategy to recruit and retain the best talent.

According to the Partnership's 2009 "Where the Jobs Are" report, the federal government will need to fill positions in nearly 273,000 mission-critical employment opportunities through September 2012. This need coincides with OPM projections that some 300,000 federal employees will be eligible to retire in the next five years.

Despite this urgent need for talent and the increased desire for flexibility and work-life balance among potential applicants, many federal agencies do not market flexible work arrangements as part of a recruitment strategy. Few agencies advertise flexible work arrangements in job announcements, and arbitrary probationary periods (often one year in length) are cited by some thought leaders as deterrents to applicants entering the federal government from more flexible organizations.

On the retention side, many federal agencies do not view flexible work arrangements as a proactive tool to keep key employees. Instead, experts indicate that flexibility options are merely seen as a benefit to individual employees who request a flexible work arrangement, with managers addressing each situation on a case-by-case basis.

Changing the mindset and strategically using flexible work arrangements to attract and retain highly needed

## BARRIERS TO FLEXIBLE WORK ARRANGEMENTS

Having learned about the limited deployment of flexible work arrangements across government, the logical question emerged, “Why aren’t they being used more?” Our focus groups and interviews revealed three key barriers.

### Management resistance

OPM’s most recent annual teleworking report released in August 2009 stated that 49 percent of federal agencies cited management resistance as a barrier to the use of telework. The primary solutions OPM offered were management and employee training. Management resistance also was the most common barrier cited in our focus groups of work-life coordinators and teleworkers. The same was true during our interviews with thought leaders and union officials.

To conduct a deeper assessment of the nature of management resistance, we held focus groups with federal executives and interviewed leaders of the Senior Executive Association (SEA). All expressed concerns about the impact of workplace flexibility on mission, including limited productivity of teleworkers. The federal executive focus group participants cited employees who are reluctant to come into the office on scheduled telework or flex days off, even when critical work requires their presence. One executive described instances where teleworkers refuse to provide home numbers and do not answer phone calls or e-mails on days when they are teleworking.

An SEA official told us that flexible work hours and teleworking can be motivating factors and help improve the workplace. However, he cautioned that managers still have legitimate concerns, including a reluctance to support telework when employees are inaccessible by phone and e-mail during work hours. There also has been a concern expressed about the conditions under which a program can be altered or cancelled and what can be done about abuse and ensuring the program supports the needs of the office—issues not always established at the onset of a telework arrangement.

Underlying some of these concerns about the use of flexible work arrangements are the performance management systems that are used with marginal success by many agencies. Managers are often unable to effectively measure the outputs of their employees, and the use of

flexible work arrangements creates added difficulties in managing performance.

The performance management challenge goes beyond flexible work arrangements and must be addressed more broadly to make federal performance measurement more results-based. Managing the performance of federal employees is a critical challenge, and managing mobile workers presents additional difficulties when performance standards are not clear.

This is evident from the comments of the SEA official, who said there have been cases when supervisors who tried to manage the productivity and performance of teleworkers were disciplined and became targets of labor unions. This has occasionally created a backlash, with managers prohibiting teleworking rather than dealing with such problems or having to manage employees they can’t see. There have been challenges to recording time and attendance, claims of abuse of telework and grievances filed by employees. The SEA official said he is concerned that managers are unduly exposed to employee and union action and are often not supported by upper-level executives who want to avoid conflict.

Engaging labor unions early in the process can help. At the Nuclear Regulatory Commission (NRC), the union played an important role in successfully designing and deploying its flexibility program. Successful agency-union partnerships like the one at NRC have been grounded in shared goals of enhancing the organization’s ability to both conduct its mission and respond to the needs of employees.

Successful use of flexible work arrangements requires collaboration between managers and employees. While managers should show flexibility and be willing to make accommodations, employees must act responsibly and be productive to gain the trust of their bosses.

Issues also arise when it comes to new employees. Some government managers value in-person socialization and acculturation of new employees. These managers are uncomfortable when new hires work outside the office, and instead argue that in-office collaboration with peers helps new employees develop interpersonal skills, build relationships with colleagues and become familiar with the culture of the organization.

## Federal Case Study At NRC, Leadership Support for Flexibility is the Key Ingredient

For senior leaders at the Nuclear Regulatory Commission (NRC), the satisfaction of being named the Best Place to Work in the Federal Government in 2007 lasted only briefly before a major question surfaced: how to stay on top?

NRC leadership knew the agency's likelihood of remaining a *Best Place to Work* rested largely on its ability to maintain a satisfied, engaged workforce. To learn more about the issues facing its employees, NRC leaders authorized a work-life committee represented by eight to 10 office directors and deputies. The committee's first step: evaluate employee responses to the Federal Human Capital Survey and NRC's Internal Safety Culture and Climate Survey to identify ways to improve employee work-life. Two major issues arose: desire for more flexibility in work hours and work location.

To address these concerns, the work-life committee implemented the NEWFlex (NRC Employee Workschedule Flexibilities) pilot program in a large office for three months. The program offered all employees more flexible work hours (the workday can begin as early as 5 a.m. and end as late as 11 p.m.) and the opportunity to telework.

Once implemented, it didn't take long for the NEWFlex pilot to gain popularity. With its success, the pilot expanded to other parts of the agency and finally was offered agency-wide in 2009. In addition to countless anecdotal success stories from the agency's employees, the Federal Human Capital Survey results suggest that NEWFlex is having a positive impact on employee work-life: NRC's work-life balance score increased from 73.2 in 2007 to 76.6 in 2009, and employee satisfaction with telework increased from 52.2 in 2006 to 61.5 in 2008.

### KEYS TO SUCCESS

#### Senior leadership support

The implementation of the agency-wide NEWFlex program would not have been possible without the support of NRC leadership. As one employee stated, "Leaders see past the barriers that exist and make every effort to ensure that all employees have the opportunity to participate in work-life programs." NRC leaders paid more than lip service to the NEWFlex program: many senior leaders in the agency use NEWFlex themselves.

#### Peer-to-peer information sharing

Despite support for the NEWFlex program by senior management, the work-life committee soon had to address objections from first-line supervisors who play a critical role in the success of any flexibility program. NRC found that sharing success stories and best practices was best done peer-to-peer. With this knowledge, the agency arranged an all-supervisors meeting featuring a panel of managers who participated in the pilot. This meeting gave managers an opportunity to ask difficult questions, hear honest answers and learn more about the NEWFlex program from peers who could relate to the challenges facing them. The peer-to-peer interaction and information sharing addressed the concerns of managers and enhanced the credibility of the program for first-line supervisors.

#### Commitment to organizational values

NRC's success as an organization rests on seven overall values that impact the work of the agency. Prominent among these values is "respect for individuals' diversity, roles, beliefs, viewpoints and work-life balance." These values are supported across the organization, from entry-level employees to senior executives.

#### Culture

According to NRC employees, the agency has a very social culture. The overlap of work and life in the agency was a contributing factor to the success of the NEWFlex pilot and still plays an important role in work-life programs today.

There are other complications. Some managers are simply unaware of a job sharing option. This knowledge gap has contributed to low usage of this type of flexible work arrangement.

### Employee and organizational barriers

The culture of an organization also can be a barrier to flexible work arrangements. In some offices, the perceived need for in-person collaboration with team members is a barrier to using flexible schedules or telework. Some employees are uneasy about the lack of face-to-face contact with their manager when tele-

working. These employees believe that face time is valued by managers and an "out of sight, out of mind" fear sets in when in-person contact is limited.

Also at play is the lack of agency telework requirements and guidelines.

Some agencies, including the NRC, the Department of Energy Office of Renewable Energy and Energy Efficiency (Golden, Colorado Field Office), and the GSA, explicitly state that all employees are eligible to telework unless their managers can provide a written justification against it. However, in most agencies, eligibility is determined either by position or by individual. This

can create confusion and even resentment when some employees see their colleagues teleworking while they are not eligible themselves.

Additionally, some organizations cite probation periods as a barrier to the use of telework. During probation periods, employees are expected to work in the office for a specific period of time (often a new employee's first year with the organization), decreasing the pool of eligible teleworkers. While these probation periods are looked upon as an important time for new employees to become acculturated in a new organization and for managers to determine whether the employee would be a good candidate for telework, focus group participants said that they are one more factor precluding a portion of the organization's workforce from teleworking.

### Technology and information security

Our focus group participants also cited technology as a major reason why many employees are unable to work remotely. Agency officials identified security concerns, particularly about unsecured networks and the review of classified information in non-secure locations. In these situations, the agency is assumed to have a more secure physical and virtual infrastructure than it can create outside of the office. Yet, telework coordinators and labor unions argue that no location—a government building or an employee's home—is ever completely secure and that security concerns should not automatically preclude the use of telework.

An additional aspect is the lack of a clear policy about who provides equipment and services. Focus group participants said that some agencies have not issued guidelines on the responsibilities of the employee versus those of the agency to provide and pay for equipment and services such as mobile phones and Internet connectivity. As a result, employees are reluctant to telework because they are unclear whether they will be expected to use their own equipment and pay for the infrastructure needed to work remotely.

The costs of technology solutions will vary widely based on each agency's equipment and security needs. For some agencies, costs could be incurred to purchase laptops; other agencies may need to make more substantial investments that update systems and software that enable them to better fulfill their missions.

### Busting Myths

#### Flexible Work Arrangements in Government

##### Myth #1

##### **Work flexibilities are just another benefit for federal employees and offer no advantage to the government.**

According to the Partnership for Public Service research, work-life balance is a driver in both young and experienced applicants' decisions to accept a job. For current employees, work-life balance is consistently one of the top three key drivers of employee satisfaction as evaluated in *Best Places to Work in the Federal Government*. GSA has found that the use of alternative schedules is an effective way for the government to recruit, retain and motivate employees.

##### Myth #2

##### **I can't manage performance that I can't see.**

By having clear performance expectations that identify measurable results and deliverables, employees who telework or use flexible schedules are able to contribute in meaningful ways to the mission of the agency. People must be measured on the basis of their results, and not on the basis of face time. Where they conduct the work is irrelevant.

##### Myth #3

##### **It just isn't the same—using technology versus face-to-face interactions with my colleagues.**

Agencies have leveraged technology that allows staff to stay in touch as effectively as if they were in the office. Chat rooms, instant messaging, document-sharing e-mail, phone and other collaboration software are just a few tools that agencies have utilized to keep communications flowing.

##### Myth #4

##### **Telework is not secure.**

Security planning that identifies potential risks and threats is needed. Defining the forms of remote access and devices, methods for encryption and authentication processes are important steps in addressing security concerns. Some agencies have successfully resolved key information security concerns, so we know it can be done.

##### Myth #5

##### **I'll lose out on promotion opportunities if I'm not seen in the office.**

The National Institute of Health asserts that a teleworker or flex worker is well positioned for promotions. These employees know how to effectively collaborate, work on a virtual team, communicate with their supervisors, and produce results. These are work qualities that position an employee for promotion consideration. Likewise, IBM established career development paths geared to a mobile environment, as a means for advancement.

## RECOMMENDATIONS

Based on our extensive review of the literature, the interviews and focus groups we conducted, and our analysis of survey data, we offer the following conclusions and corresponding recommendations to address the barriers to flexibility and increase the strategic use of flexible work arrangements in the federal government.

### Significantly increase the use of telework, job sharing and part-time schedules

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Our research shows that while compressed workweeks and flextime have become accepted practices, telework, job sharing and part-time schedules are underutilized by federal agencies. Increased use of these tools can help agencies meet mission needs; recruit, engage and retain top talent; and reduce costs. Expanding the use of these flexibilities will require action by President Obama, OPM and federal agencies.

#### President Obama

Issue an executive order requiring agencies to set goals and increase the strategic use of flexible work arrangements. This order should address monitoring, evaluation and parties with authority and accountability for expanding the use of flexible work arrangements.

#### OPM

Set an ambitious goal for half of the nearly 1.2 million eligible federal employees, or about 600,000 civil servants, to be teleworking by 2014. This should coincide with an OPM directive that states that all employees are eligible to telework unless a supervisor or manager can demonstrate why an employee is not eligible. OPM should also direct each agency that now has fewer than 50 percent of their eligible employees teleworking to develop an action plan—with annual updates—to achieve the goal. Currently, the administration's plan is to increase the number of teleworkers from 102,900 to 150,000 in the next two years—a good first step, but a more aggressive goal is necessary for the long term. Our recommended goal would mirror the practices of innovative private-sector companies that make productive use of robust telework programs.

OPM also should determine an appropriate goal to increase the number of part-time and job sharing

opportunities and encourage agencies to inform employees that this option is available.

#### Agencies

Our research found that management resistance is a major barrier to expanding the use of flexible work arrangements. This resistance must be understood and addressed in order for an agency to expand flexibility while maintaining strong employee performance. The following recommendations are steps agencies can take to overcome resistance from managers.

The Telework Managing Officer (TMO) in each agency, in consultation with line managers, senior leaders, labor unions and rank-and-file employees, should develop a policy consistent with the OPM directive to expand the scope of eligibility.

The TMO should also address the roles and responsibilities of employees and managers. Expectations should include clearly defined objectives, responsibilities, training, communication, employee accessibility during work hours, office coverage, unexpected mission-critical work demands and procedures to deal with abuse.

Agencies also should include training on flexible work arrangements in new manager and employee orientation and onboarding, and repeat the training in refresher courses for all managers and employees. Agencies should ensure that managers hold employees to the same performance standards regardless of their participation in flexible work arrangements. Agency leaders should also communicate success stories about employees who telework or work alternative schedules to send a clear message that flexibility is a part of the agency culture and should be given serious consideration by managers.

### Enact telework legislation

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#### Congress

Congress. Congress has drafted two pieces of legislation to increase telework, S.707, the Telework Enhancement Act of 2009, and H.R. 1722, the Telework Improvements Act of 2010. The Partnership believes these bills represent important steps to increase the strategic use of telework in federal agencies, and that

Congress should reconcile the differences in the two bills and give final approval to a single measure that can be signed by the president. The Partnership believes the final version should include the more detailed House language that defines telework's role in agency mission continuity plans, and requires collaboration between agencies. The House language also specifically outlines the role of the Telework Managing Officer and explicitly provides reporting requirements, telework definitions and participation guidelines.

The Partnership also believes Congress should conduct regular oversight of agency use of telework and other flexible work arrangements to ensure that these tools are adequately resourced and effectively implemented.

### **Link telework to mission continuity programs**

Unexpected events and emergencies have proven that telework can be an effective way for agencies to continue to operate during crises. Nonetheless, only 44 of 78 federal agencies include telework in their continuity of operations planning (COOP).

#### **Agencies**

All agencies should incorporate telework into their COOP plans and into other mission or business continuity planning. Agencies should routinely test their telework systems to ensure that mission continuity can be maintained during an unexpected crisis, both as a part of formal COOP exercises and in other types of mission continuity activities, such as a designated "telework day." The pending congressional legislation would require telework to be incorporated into continuity planning, but it should take place irrespective of enactment of the legislation.

Agencies should develop clear procedures for teleworking during times of national emergency or unexpected contingencies, and guidance that requires all employees who telework (including those who telework on an ad-hoc or situational basis) to have telework agreements. The guidance should clarify that all teleworkers, including those who telework on an ad-hoc, regular or situational status, are expected to telework when government facilities are closed.

#### **DHS**

DHS should monitor the inclusion of telework in agency COOP plans. DHS also should monitor

whether agencies annually test the ability of telework to support COOP exercises and other mission continuity activities.

### **Make smart business investments to support telework and make it successful**

Technology is a key cost of flexibility programs, but can also lead to savings. Mature flexibility programs ensure that managers work with IT leaders to provide a suite of tools to all employees, whether they work in the office or remotely, and also ensure that technology is regularly refreshed. At the same time, agencies can deploy work flexibilities as a way of reducing their facility footprints and saving money.

#### **GSA**

As part of its facility and long range master planning services for federal agencies, GSA should advise agencies on how to reduce their real estate costs through telework.

#### **OMB**

The budget office should require that an agency's use of teleworking and remote offices be reflected in all construction project or facility expansion budget requests. Each request should include methods and strategies for minimizing the infrastructure footprint. OMB should require agencies to strategically assess how remote office use can reduce the need for permanent offices, leading to fewer one-person offices or more use of shared space ("hoteling").

#### **Agencies**

Agencies should identify the types of technologies that will enable remote access, including software that supports collaboration, connectivity and communication among employees regardless of their location. Budget requests should address how an agency has considered the impact of teleworking in its facilities planning, and should investigate ways to offset the investment costs of equipping employees with remote access tools, and calculate potential savings of hoteling or moving employees who regularly telework from a private office to a cubicle. Agencies can hedge their bets in the short-term by purchasing a limited number of laptops to loan to teleworkers rather than immediately replacing all office desktop computers with laptops.

## Start with pilot programs for flexible work arrangements and then expand

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### Agencies

Agencies with limited use of flexible work arrangements or those that wish to strategically expand their existing programs should implement flexibility pilots. Pilot programs have been identified in our research as the best approach for building successful flexibility programs because they can help determine program design and implementation and allow agencies to “practice” in smaller units to identify challenges, overcome barriers and ease management concerns.

### OPM

OPM should facilitate discussions between agency leaders initiating or expanding workplace flexibility programs and their counterparts in other agencies who have demonstrated proven success. These discussions should occur through forums such as quarterly telework and work-life agency meetings or in discussions with the Chief Human Capital Officer Council. Potential topics could include creating a business case for flexible work arrangements, identifying technological solutions for teleworkers and engaging cross-agency stakeholders.

If successful, OPM should consider expanding the ROWE pilot to agencies that are ready to take their flexibilities programs to a new level of innovation (i.e., that have strong leadership support, a performance culture and a proven track record of success).

## Solve the information security challenges

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A major barrier to expanding telework is a perceived lack of data security when employees work remotely. Successful agencies have found that engaging IT stakeholders early and working with them to make security investments can overcome this barrier. Currently, no federal clearinghouse exists for information and recommendations on secure telework architecture, continuity testing and evaluation, risk mitigation strategies, encryption and authentication solutions and other technical challenges related to remote access.

### OMB

The Federal Chief Information Officer (CIO), located in OMB, is ideally positioned to bring together top agency officials and thought leaders on information security. The Federal CIO should encourage opportunities for information and technological exchange to address remote access technology challenges and

information protection. These activities should include sponsoring an annual roundtable discussion of remote access issues and practices and ensuring that secure remote access solutions are addressed in the Federal CIO Council Boot Camp.

Two committees that support the Federal CIO could potentially play important roles in transferring knowledge and information security solutions to agencies grappling with these challenges. The Information Security and Identity Management Committee enables CIOs and Chief Information Security Officers to collaborate on high priority security initiatives and recommend enhancements to federal government networks and information security systems. The Best Practices Committee is as a focal point for promoting information management/information technology within the federal government. Because this committee engages the private sector and federal agencies in discussing remote access IT solutions, it can serve as a conduit to share best practices across agencies.

### Agencies

Agencies with limited use of telework or those who wish to expand existing programs need to collaborate with their CIOs and information security staff early to assess the current state of remote work capabilities and related security needs. Those agencies with mature information security solutions should advise those in initial stages of development about how to integrate security policies into telework program design, including secure data exchanges, encrypted point-to-point VPN connections, critical data storage, encrypted hard drives, access limitations and bandwidth requirements. Agencies should ensure that all teleworkers and managers participate in annual information security training that covers information protection, use of equipment, risk identification and technology management. This is particularly important for the Intelligence Community and other agencies with highly sensitive data.

## Monitor and evaluate the use of all flexible work arrangements across the entire federal government

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Although federal agencies track the use of telework for OPM’s Annual Report to Congress, and OPM collects job sharing and part-time statistics, agencies are not required to track the use of flextime and compressed workweeks.

**OPM**

OPM should create an online dashboard that offers real-time data on each agency's flexible work arrangements program, replacing the annual telework report to Congress and adding information on the other flexibilities. Examples of data available on the dashboard could include the number of teleworkers and the frequency with which they work remotely. It should also track ad-hoc, informal, situational and regular use of telework. The dashboard will be a tool to give OPM, Congress, senior leaders, managers and employees immediate information regarding the status of federal telework programs.

OPM should also explore why part-time work and job sharing flexibilities are not used more often in federal agencies and identify the benefits of expanding use of these flexibilities. One way to do this is to add questions to its annual Employee Viewpoint Survey (EVS) to learn more about employee interest in and barriers to part-time schedules and job sharing.

**GAO**

GAO should evaluate agency telework programs, assessing agency costs, potential savings of telework, agency testing of telework support to COOP and mission continuity systems, IT resources and information security solutions being used to implement remote access. GAO should also evaluate the implementation and results of OPM's ROWE pilot program.

- Employee satisfaction and attitudes about flexibility, using the Family Friendly Culture dimension of the Partnership's *Best Places to Work* rankings, which provide data on satisfaction with telework and alternative work schedules;
- Data gathered after continuity of operation exercises or telework stress tests to determine whether IT systems effectively supported remote work;
- Feedback from focus groups or surveys before, during and after pilots to identify issues needing attention and to measure key results;
- Feedback from exit surveys on the extent that the lack of flexible work arrangements influenced decisions to leave;
- Impact of flexible work arrangements on agency ability to recruit and retain needed talent;
- Costs of employee reimbursement for remote access tools;
- Savings from reduced travel and expanded online collaboration tools; and
- Savings from reduced employee relocation costs.

### Use key metrics to assess and improve individual agency flexible work arrangement programs

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Because many federal leaders do not understand the mission benefits of flexible work arrangements, key metrics are critical to document impacts and benefits at individual agencies.

**Agencies**

Agencies and private-sector companies with successful flexible work arrangement programs use specific metrics to evaluate implementation and results. They then analyze these data to drive decision-making. Potential metrics to assess flexibility programs include:

- The number of employees using flexible work arrangements;

## FLEXIBLE WORK ARRANGEMENTS MATURITY MODEL

We recognize that agencies may be at varying stages in implementing flexible work arrangements programs and may be facing different and unique challenges. Outlined below is a flexible work arrangements maturity model that addresses the barriers to expanded use of flexible work arrangements in three key areas and guides agencies through the various stages of flexibility

implementation. The maturity model features four core elements critical to the success of a flexible work arrangements program: culture, resources, management and strategic integration. All key stakeholders—including agency leaders, program coordinators, managers, employees and labor unions—play key roles in sustain-

**Table 2** Flexible Work Arrangements (FWA) Program Maturity Primary Characteristics

Core Elements	Initiating	Expanding	Mature
<b>CULTURE</b> <i>People</i>	Face time and working long hours are necessary to build career	FWA participants acknowledged, but bear most of the responsibility to integrate with team	All employees periodically tailor use of FWAs to meet needs
	<i>Process</i> High-touch, in-person work procedures (e.g., original signatures, hard copies required)	Limited work attributes considered appropriate for FWAs (e.g., minimal dependency on others)	FWAs do not exist as separate programs; flexibility is integrated into all aspects of work
	<i>Technology</i> Infrastructure supports in-office, 9-to-5 workforce; work-arounds made to enable FWAs	Some tools added to existing infrastructure to enable FWAs	New capabilities (e.g., social media, cloud computing) enable mainstream use of FWAs
<b>RESOURCES</b> <i>People</i>	FWA program managers have collateral duties, no staff, and no visibility to senior leadership	FWA program managers have more control over resources; some input into senior-level decisions	FWA programs have staff, budget, and access to senior leaders
	<i>Process</i> FWA investment is minimal, uncoordinated, and untracked	FWA costs and benefits are tracked; FWA has a budget line item	Flexibility is fully funded and managed like other major organizational initiatives
	<i>Technology</i> Flexibility not a consideration in IT planning; infrastructure not designed for FWAs	Infrastructure assessed; enhancements to support FWAs planned and budgeted	IT equipment, services, and infrastructure provided to allow flexibility for all employees
<b>MANAGEMENT</b> <i>People</i>	FWAs allowed on a case-by-case or inconsistent basis; may be implemented in secret	FWAs are consistently available as an employee benefit	FWA needs and participation part of regular management discussions
	<i>Process</i> FWAs considered a hindrance to getting work done	Some linkages between FWAs and strategic priorities established/measured	FWA-related goals (e.g., recruitment/retention, productivity, engagement) are set and measured
	<i>Technology</i> Technical issues (e.g., equipment availability/security) seen as a reason to disallow FWAs	Expanded IT tools, and services allow more frequent and prevalent use of FWAs	Modern IT capability enables seamless work flexibility
<b>STRATEGIC INTEGRATION</b> <i>People</i>	Leaders unaware of how non-work demands limit effectiveness of workforce	Leaders realize that FWAs are necessary to address pressing needs of current/future workforce	“Reason-neutral” work flexibility is a core value
	<i>Process</i> FWA participants’ mission contribution is discounted	Some linkages between FWAs and strategic priorities established/measured	FWAs promoted by leadership as a way to optimize performance of the entire workforce
	<i>Technology</i> Lack of foresight in how tools/technology can improve work efficiency and enable FWAs	Leaders see potential of IT to modernize agency’s work	IT infrastructure and tools tailored to maximize flexibility as a normal way of working

ing and advancing the maturity of an organization's flexibility program.

Agencies with limited flexible work arrangements may find themselves in the **"Initiating"** stage. In this beginning stage, in-person interactions are highly valued in the organization and employees using flexibilities may face limited promotion potential. Investment in flexibility programs is limited, and work-life and telework coordinators have collateral duties. Technologically, the organization's infrastructure primarily meets the needs of in-office employees, although solutions can allow individual teleworking where permitted. Supervisors and managers expect employees to report to work in-person, and flexibility is managed on a case-by-case basis. Managers measure employee performance and productivity in large part by tracking attendance in the office rather than tracking results. Flexible work arrangements in initiating programs are seen as an impediment to mission accomplishment. Most of the federal agencies we interviewed for this study fall into the "Initiating" stage of the maturity model; flexible work arrangements exist in these organizations, but they are often offered on an individual basis and are not looked at as part of a strategic business plan.

Organizations that have addressed some of the challenges identified in the "Initiating" stage, but do not yet have the complete support of senior leaders, line managers and agency IT personnel may be considered as **"Expanding."**

In these organizations, flexible work arrangements are more accepted in the workplace, with less emphasis on in-person interactions between employees and supervisors. Costs and benefits are measured, and work-life and telework coordinators have a more direct line to senior leaders. IT investments are made to provide remote access tools to teleworkers. Flexible work arrangements are viewed, and offered to employees, as a benefit. Managers understand that specific projects can be accomplished outside of the workplace. Flexibility programs are included in the strategic plan of the organization. Some senior leaders even participate in the programs themselves.

Finally, **"Mature"** agencies have programs that have been fully integrated into the overall culture of the organization, are supported by senior leaders and management, and feature a developed IT structure.

Mature organizations offer a menu of flexibility options. Most employees are eligible to use flexible work arrangements and, by mixing and matching the avail-

able programs, they are able to tailor these flexibilities to meet their individual needs. New technologies are used to encourage collaboration among employees and managers, even from remote locations. Work-life and telework coordinators have a direct line to senior leaders. Telework coordinators work with IT leaders to provide a suite of technology tools to all employees inside and outside the office. Technology updates to accommodate teleworking are incorporated into the regularly scheduled procurement of new equipment. Supervisors support formal flexibility agreements and are open to the use of informal flexible work arrangements that are logical and appropriate. Performance is assessed based on measurable results, not in-person attendance. Senior managers use flexible work arrangements themselves and provide resources to support work-life and telework programs. Flexibility programs are included in the strategic plan of the organization and are looked upon as a way to maximize the performance of employees and the organization as a whole. Their use and effectiveness are measured on a regular basis.

The hallmarks of a mature flexibility program are: 1) seamless integration of flexibilities into regular work operations; 2) availability to all members of the workforce; and 3) an appreciation of the multiple benefits of the program. A critical component of a mature flexibility program is identifying desired outcomes and then developing—and using—metrics to evaluate success. At the outset of the program, agencies should ask two key questions:

- What are the goals and objectives of our flexible work arrangements program?
- How will we measure whether the program is successful?

Metrics directly support the goals and objectives of the flexibility program and can measure employee productivity, manager and employee satisfaction, effectiveness of technological tools and mission and business benefits.

Regular evaluation helps ensure that objectives are being met. Surveys are helpful tools to collect data on the experiences of managers and employees, the usefulness of telework technology and the benefits of telework. Results should be shared with agency leadership and across the organization. For example, the PTO releases an annual telework report that highlights the accomplishments, updates and the future of telework at the agency. This can be a great way to share lessons learned, adjustments and plans for the future.

As the case studies featured in this report illustrate, several organizations have achieved maturity, and other agencies can learn from them. These success stories prove that implementing flexibility can provide real benefits to the organization and its employees without impeding mission accomplishment.

## APPENDIX A: METHODOLOGY AND CONTRIBUTORS

### Methodology

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To determine how flexible work arrangements are utilized in the federal government, the Partnership for Public Service and Booz Allen Hamilton conducted an extensive literature review of more than 200 articles, publications, guidelines and policies from sources that included OPM, GSA, GAO, U.S. Department of Labor, Telework Exchange, SHRM, GovExec Magazine, Federal Computer Week, Federal News Radio, Washington Post, Next Gov, Boston College Center for Work and Family, Workplace Flexibility 2010, JAP, WorldatWork, Families and Work Institute, Alliance for Work-Life Progress, Sloan Work and Family Research Network, Community Work and Family, Corporate Leadership Council, Corporate Voices for Working Families and others. Our study focused on five flexible work arrangements: compressed, flex and part-time schedules; job sharing and telework.

We held focus groups with federal work-life and telework coordinators, teleworkers, managers and federal executives; surveyed telework and work-life coordinators; and interviewed agency officials, work-life and telework thought leaders from the private and nonprofit sectors, federal executive associations and labor unions. The information was categorized, reviewed, analyzed and validated by subject matter experts to ensure that we collected a comprehensive data set. We reviewed and analyzed the literature to develop validated answers to our research questions. Finally, we integrated findings from interviews, focus groups and survey data into the analysis.

### Contributors

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#### **Booz Allen Hamilton**

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## APPENDIX B: TOOLS AND RESOURCES

**Purpose:** The purpose of this Flexible Work Arrangements (FWA) toolkit is to maximize the success of FWA program implementation. The toolkit provides managers, employees and organizations with best practice suggestions as well as sample templates and tools. The toolkit also includes references to existing resources (e.g., websites).

1. Broaden the Program: Creating a Sample Flexible Work Arrangement Policy
2. Sample Flexible Work Arrangement Agreement
3. Sample Flexible Work Arrangement Strategic Goals in Agency Strategic and Human Capital Plans
4. Effective Management and Employee Tips and Techniques: This section provides individuals that supervise teleworkers and/or employees using other Flexible Work Arrangement (e.g., job sharing, part-time work, compressed work weeks, flextime) with:
  - i. Suggestions for Effectively Managing Employees who use Work Flexibilities
  - ii. Managers and Employees: Suggestions for Considering Work Flexibilities
  - iii. Assessing Employee Readiness for Successful Use of Flexibilities
5. Federal Agencies: This section provides organizations with:
  - i. Sample Job Announcement that Addresses Telework Eligibility
  - ii. Web Resources on Information Security and Remote Office Access

## B.1. Broaden the Program: Creating a Sample Flexible Work Arrangement Policy

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Federal agencies are required to have telework policies, but most do not have the broader policy that addresses a strategic approach to flexible work arrangements. The following sample policy offers a template that agencies can build upon.

### Sample Telework/FWA Policy

#### Flexible Work Arrangements Program

[Organization's] flexible work arrangements program was instituted to promote a healthy work-life balance while improving the agency's ability to meet its mission and business needs. The following policy lays out the terms and conditions of [organization's] flexible work arrangements program.

#### Flexibility Options

*Compressed Workweek:* Consists of workdays with core hours and flexible hours. Core hours are the designated period of the day when all employees must be at work. Flexible hours are the part of the workday when employees may (within limits or "bands") choose their time of arrival and departure.

*Flextime:* Typically allows the bi-weekly basic work requirement of 80 hours to be scheduled over fewer than 10 workdays (for full-time employees). An example is a four-day, 10-hour-day workweek.

*Job Sharing:* Allows two or more part-time employees to fill one position.

*Part-time Schedule:* Allows a permanent employee to work 16-32 hours each week on a prearranged schedule.

*Teleworking:* Allows an employee to regularly perform work from remote locations.

#### Using Flexible Work Arrangements

*Requirements and Eligibility:* All employees are eligible to use at least one of the flexibilities in an organization's program. There may be instances, however, in which certain flexibilities may not be appropriate for all employees. For further clarity on instances in which an employee may be denied access to one or more flexibilities, please see our organization's telework or work-life coordinator.

*Application:* To apply for a flexible work arrangement, the employee must submit an application to the telework or work-life coordinator. While it is recommended, the employee may choose whether to speak to their supervisor before submitting a flexible work arrangements application. The employee's supervisor will be notified that an application has been submitted and will have an opportunity to provide a written request for denial to the telework or work-life coordinator. The telework or work-life coordinator will grant permission or denial for the employee to use the requested flexibility and will inform the applicant of the decision.

*Training:* All employees and managers participating in a flexible work arrangement program will be required to complete a mandatory training course. The organization's work-life coordinator and/or Telework Managing Officer will provide more information about this course.

*Performance Standards:* Performance of the employee using flexible work arrangements will be measured by a manager or supervisor using clear, objective standards. If a manager or supervisor has proof of an employee's failure to meet performance objectives, they may submit a written proposal to the telework and/or work-life coordinator to suspend the flexible work arrangement(s).

*Benefits:* All benefits—including, but not limited to, salary, healthcare coverage, retirement contributions, vacation and sick leave and overtime pay—remain the same for employees who use flexible work arrangements as well as those who do not. Part-time employees are eligible for the same benefits as full-time employees, but only on a prorated basis.

*Dependent Care:* Participation in a flexible work arrangements program is not a substitute for external dependent care. Arrangements must be made for the care of dependents during working hours. Violation of this policy may result in the termination of the flexibility agreement.

*Termination:* The employee may terminate his/her flexible work arrangement at any time. To do so, the employee must meet with his/her supervisor to determine the final date on which the flexibility arrangement is valid. If the supervisor is interested in terminating the flexible work arrangement, he or she can submit a formal report to the telework or work-life coordinator that details the specific reasons for a requested termination. The supervisor must also meet with the employee in question to review the request for termination. The telework or work-life coordinator will assist the supervisor and employee in resolving the termination request.

*Evaluation:* [Organization's] telework or work-life coordinator is required to submit an annual report on the agency's use of flexible work arrangements. Details to be reported include, but are not limited to: the number of flexibility users in the organization; communication mechanisms used to promote the program; major challenges facing the use of flexibilities and strategies implemented to overcome these barriers; and cost savings and other benefits realized due to the program.

### **Additional Policies for Teleworking**

*Eligibility:* All employees with a performance rating of “fully successful” or higher at [organization] are eligible to telework at least one day per pay period. If a supervisor feels that an employee is not suitable for telework based upon the characteristics of his/her job, a written request to deny a teleworking arrangement may be submitted to the organization's telework coordinator. The telework coordinator will meet with both the supervisor and employee to determine whether a teleworking arrangement is appropriate and, in the event that the teleworking request is denied, to identify other flexibility options that may be better suited to the employee.

*Application:* Before submitting an application to telework, it is recommended that employees complete a self-assessment to determine whether a remote access arrangement is appropriate for them. To apply for the teleworking program, the employee must submit an application to the telework coordinator. The employee's supervisor will be notified that a telework application has been submitted and will have an opportunity to provide a written request for denial to the telework coordinator. The telework coordinator will grant permission or denial for the employee to telework and will inform the applicant of the decision.

*Agreement:* Once permission to telework has been granted, the employee and his/her supervisor must fill out the flexible work arrangements agreement, providing answers to specific questions regarding telework. This agreement must be submitted to [organization's] telework coordinator and must be renewed annually. Performance reviews will be held three times a year, at which time performance outcomes and any adjustments to the telework arrangement will be discussed.

*Equipment:* All teleworkers are required to use a laptop provided by [organization]. This laptop will provide remote access to all documents and software needed by the teleworking employee and will be regularly updated with the latest security software by agency IT professionals. A member of [organization's] IT staff is available from 5:00 a.m. – 11:00 p.m. to handle questions or problems arising from the use of agency-provided equipment. [Organization] is not responsible for the costs of electricity, Internet connection and phone lines due to teleworking.

Employees who work remotely are required to participate in all scheduled meetings via telephone and must answer all business-related phone calls during working hours. To accommodate this, [organization] will work with all teleworkers to install a system to transfer office phone calls to a home or mobile phone number. [Organization] will also work with all teleworkers to ensure that they have one data line dedicated to Internet use, so calls can be made simultaneously.

## B.2. Sample Flexible Work Arrangement Agreement

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As with telework policies, federal agencies use telework agreements but most do not have the broader flexible work arrangements. The following sample agreement offers a template that identifies important procedures and practices associated with work flexibilities. Agencies can use this template to as a starting point.

### Sample Agreement

The following agreement, effective [date], is between [name], an employee, and [organization], the employer.

The parties agree to the following terms:

#### Using Flexible Work Arrangements

*Requirements and Eligibility:* All employees are eligible to use at least one of the flexibilities in [organization's] programs. There may be instances, however, in which certain flexibilities may not be appropriate for all employees. For further clarity on instances in which an employee may be denied access to one or more flexibilities, please see the organization's telework or work-life coordinator.

*Application:* To apply for a flexible work arrangement, the employee must submit an application to the telework or work-life coordinator. While it is recommended, the employee may choose whether to speak to their supervisor before submitting a flexible work arrangements application. The employee's supervisor will be notified that an application has been submitted and will have an opportunity to provide a written request for denial to the telework or work-life coordinator. The telework or work-life coordinator will grant permission or denial for the employee to use the requested flexibility and will inform the applicant of the decision.

*Training:* All employees and managers participating in a flexible work arrangements program will be required to complete a mandatory training course. The organization's work-life coordinator and/or Telework Managing Officer will provide more information about this course.

*Performance Standards:* Performance of the employee using flexible work arrangements will be measured by a manager or supervisor using clear, objective standards. If a manager or supervisor has proof of an employee's failure to meet performance objectives, they may submit a written proposal to the telework and/or work-life coordinator to suspend the flexible work arrangement(s).

*Benefits:* All benefits—including, but not limited to, salary, healthcare coverage, retirement contributions, vacation and sick leave and overtime pay—remain the same for employees who use flexible work arrangements as well as those who do not. Part-time employees are eligible for the same benefits as full-time employees, but only on a prorated basis.

*Dependent Care:* Participation in a flexible work arrangements program such as telework is not a substitute for external dependent care. Arrangements must be made for the care of dependents during working hours. Violation of this policy may result in the termination of the flexibility agreement.

*Termination:* The employee may terminate his/her flexible work arrangement at any time. To do so, the employee must meet with his/her supervisor to determine the final date at which the flexibility arrangement is valid. If the supervisor is interested in terminating the flexible work arrangement, submit a formal report to the telework or work-life coordinator that details the specific reasons for a requested termination. The supervisor must also meet with the employee in question to review the request for termination. The telework or work-life coordinator will assist the supervisor and employee in resolving the termination request.

*Evaluation:* [Organization's] telework or work-life coordinator is required to submit an annual report on the agency's use of flexible work arrangements. Details to be reported include, but are not limited to: the number of flexibility users in the organization; communication mechanisms used to promote the program; major challenges facing the use of

flexibilities and strategies implemented to overcome these barriers; and cost savings and other benefits realized due to the program.

**Additional Policies for Teleworking**

*Eligibility:* All employees with a performance rating of “fully successful” or higher at [organization] are eligible to telework at least one day per pay period. If a supervisor feels that an employee is not suitable for telework based upon the characteristics of his/her job, a written request to deny a teleworking arrangement may be submitted to the organization’s telework coordinator. The telework coordinator will meet with both the supervisor and employee to determine whether a teleworking arrangement is appropriate and, in the event that the teleworking request is denied, to identify other flexibility options that may be better suited to the employee.

*Application:* Before submitting an application to telework, it is recommended that employees complete a self-assessment to determine whether a remote access arrangement is appropriate for them. To apply for the teleworking program, the employee must submit an application to the telework coordinator. The employee’s supervisor will be notified that a telework application has been submitted and will have an opportunity to provide a written request for denial to the telework coordinator. The telework coordinator will grant permission or denial for the employee to telework and will inform the applicant of the decision.

*Agreement:* Once permission to telework has been granted, the employee and his/her supervisor must fill out the flexible work arrangements agreement, providing answers to specific questions regarding telework. This agreement must be submitted to [organization’s] telework coordinator and must be renewed annually. Performance reviews will be held three times a year, at which time performance outcomes and any adjustments to the telework arrangement will be discussed.

*Equipment:* All teleworkers are required to use a laptop provided by [organization]. This laptop will provide remote access to all documents and software needed by the teleworking employee and will be regularly updated with the latest security software by agency IT professionals. A member of [organization’s] IT staff is available from 5:00 a.m. – 11:00 p.m. to handle questions or problems arising from the use of agency-provided equipment. [Organization] is not responsible for the costs of electricity, Internet connection and phone lines due to teleworking.

Employees who work remotely are required to participate in all scheduled meetings via telephone and must answer all business-related phone calls during working hours. To accommodate this, [organization] will work with all teleworkers to install a system to transfer office phone calls to a home or mobile phone number. [Organization] will also work with all teleworkers to ensure that they have one data line dedicated to Internet use so that calls can occur simultaneous to online operations.

**Acceptance of Conditions**

I have read and understand this Agreement and accept its conditions.

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Employee Signature Date

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Supervisor Signature Date

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Reviewing Official Signature Date

### B.3. Sample Flexible Work Arrangement Strategic Goals

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Few agencies focus on flexible work arrangements as a comprehensive mission and business strategy. We found that only a very small number of agencies addressed flexibilities as a strategic tool. Most often, flexibilities are communicated primarily as a “benefit” included in orientation or in the employment handbook.

TIGTA reflected its commitment to employee work/life balance in their agency’s strategic values and identified key objectives focused on telework, performance results and service design. We are providing actual language to demonstrate the integration of strategic human capital goals.

#### **Treasury Inspector General for Tax Administration (TIGTA) STRATEGIC PLAN FY 2009 - 2014** **An IG Like No Other: Protecting the Nation’s Income Stream**

##### **Goal 3. Be an Organization that Values Its People**

The key to achieving the first two goals is to provide a secure infrastructure of operational excellence, which develops a highly skilled and valued staff. TIGTA is challenged to maintain its “Best Places to Work” status and will streamline processes, utilize distributed work teams and prototype new technologies and methodologies to meet this challenge. Through these efforts, TIGTA will strive to enhance its business impact on the federal government.

The following objectives will be implemented to achieve this goal.

##### **OBJECTIVE**

- Ensure a high-quality, diverse and motivated workforce with the knowledge, skills and abilities needed to produce quality products in an efficient and effective manner.
- Enhance efforts to develop emerging leaders using targeted development and training to close skill gaps, improve diversity and ensure the nurturing of a results-oriented performance culture.
- Recognize and reward employees for their contributions toward achieving the organization’s priorities and outcomes.
- Enhance efforts to ensure that we recruit and retain a dedicated and diverse workforce while providing an environment that promotes appreciation for employees’ professional contributions.
- Maintain our commitment to providing a work environment that prepares our organization to meet generational transitions while nurturing a results-oriented performance culture.
- Develop TIGTA’s workforce to meet current and future organizational needs by identifying and developing emerging leaders, closing skills gaps, streamlining business processes and building bench strength at all levels.
- Develop and implement new methodologies to move TIGTA to the forefront of organization design by expanding service methods, and by adopting advances pioneered by the new, networked generation.
- Focus TIGTA’s performance management system so that it rewards achievement consistent with TIGTA’s mission and goals.
- Enhance and expand our telecommuting program to strengthen operational continuity and to better ensure TIGTA employees the ability to develop a strong work-life balance.

#### B.4.i. Effective Management and Employee Tips and Techniques Suggestions for Effectively Managing Employees who use Work Flexibilities

Flexible work arrangements offer several benefits to managers across the federal government, such as improved productivity due to less frequent interruptions, more satisfied and committed employees, and increased access to untapped talent pools (e.g., part-time, semi-retired). The following section reviews best practices for managers supervising employees using flexible work arrangements.

Best Practices	Description
Walk the talk	As a manager, you serve as a firsthand resource to the flexible work arrangements program offered by your agency. Make sure that you understand the flexible work policies—including telework, part-time and job sharing. Your understanding of the various work flexibility options will help you to discuss which flexibilities help meet your employee and mission needs. Your participation in working flexibly is a powerful way to demonstrate your support for the programs.
Facilitate a results-oriented performance culture	Performance management is integral to the successful implementation of work flexibilities. Setting clear expectations of performance results at the beginning of the year as well as providing continuous feedback helps build a results-oriented performance culture. Provide continual performance feedback and conduct at least quarterly formal performance reviews.
Foster an environment of trust and open communication	Based on our qualitative findings, management can deploy several strategies for creating trust when they cannot see an employee conducting his or her daily work because of telework. Supporting an “open-door” policy will encourage bi-directional feedback on both the employee’s performance as well as the flexible work arrangements program in general. Trust employees to perform duties when away from supervisor’s direct contact. Set clear expectations about employee accessibility on telework days.
Leverage communication technologies	Take advantage of various communication technologies, like Microsoft Messenger and Microsoft Office Communicator 7.0, a software program cited by several federal telework coordinators as an excellent approach to instant messaging (IM) and other real-time communications capabilities. It enables workers to communicate with one another more easily and quickly. Partake in virtual meetings using video teleworking, conference calls with pass codes and Skype, which offers free voice and video calling. You can also use IM and SMS on a wide range of operating systems and mobile devices. Encourage regular status updates via e-mail or phone. Leverage document-sharing websites (e.g., iShare) to make documents available to your on-site as well as off-site employees. Ensure that employees are using basic technologies such as phone forwarding and providing a number they can be reached at all times on remote work days.
Be fair and consistent	Ensure that you are applying the flexible work arrangements program policies fairly and consistently across your organization. We want to avoid an “out of sight, out of mind” situation in which an employee is overlooked for assignments or promotions. Likewise, look for groups of positions that are good telework candidates and don’t use “by-name” eligibility determinations for telework. However, be willing to use work flexibilities to accommodate unique employee situations that can arise from any number of life issues (e.g. births or adoptions, educational opportunities, home schooling, personal medical issues, elder care and family crises). Why would you want great employees to leave if flexibilities allow them to be retained by providing the right work/life solutions?

**B.4.ii. Effective Management and Employee Tips and Techniques  
Suggestions for Considering Work Flexibilities**

<b>Flexible Work Arrangement</b>	<b>Workplace and Management Considerations</b>	<b>Employee Considerations</b>
Compressed workweek	<ul style="list-style-type: none"> <li>Does the agency have the ability to track schedules? Actual use?</li> <li>Does the work allow for compression (i.e., 3-day weekends)?</li> <li>Does coverage exist on days when employees are not in the office?</li> </ul>	<ul style="list-style-type: none"> <li>Does the employee have the ability to get the work done over a shorter workweek?</li> <li>Will the employee be able to support unexpected mission priorities that may result in schedule adjustments?</li> <li>Does the compressed schedule provide the employee the ability to deal with work/life issues more effectively?</li> </ul>
Flextime	<ul style="list-style-type: none"> <li>Does the work allow for varied work hours?</li> <li>Would agencies be able to expand service delivery with greater staff coverage during nontraditional hours?</li> </ul>	<ul style="list-style-type: none"> <li>Would employees be interested in working during nontraditional hours?</li> <li>Are childcare arrangements available that would allow for nontraditional hours?</li> </ul>
Job sharing	<ul style="list-style-type: none"> <li>Could positions in your organization be shared with another part-time employee?</li> <li>Suggest a pilot test where managers, clients, and co-workers could assess the arrangement.</li> <li>Are you able to accommodate the employee's needs in order to retain their talents?</li> <li>Are the candidates good communicators, willing to collaborate as members of a team rather than as competitors, and demonstrate flexibility and the commitment making the job sharing arrangement work?</li> </ul>	<ul style="list-style-type: none"> <li>Find a partner and propose a job sharing arrangement.</li> <li>Do employees have the ability to maintain open communication with each other to ensure the work gets accomplished in a seamless manner?</li> <li>Apply for any job sharing vacancies.</li> <li>Be willing to participate in an initial pilot.</li> <li>Talk to other employees who job share.</li> </ul>
Part-time work	<ul style="list-style-type: none"> <li>Could the work you need done be completed in fewer hours?</li> <li>Could less important tasks be discontinued or done by another employee?</li> <li>Are you able to accommodate the employee's needs in order to retain their talents?</li> </ul>	<ul style="list-style-type: none"> <li>Propose restructuring your full-time job into a part-time job.</li> <li>Assess changes to salaries, leave earnings, health insurance costs, and retirement and life insurance benefits.</li> <li>Apply for any part-time vacancies.</li> <li>Talk to part-time employees about their experiences.</li> </ul>
Telework	<ul style="list-style-type: none"> <li>Does the agency have the technological equipment and resources to handle working off-site?</li> <li>Does the work require face-to-face interaction? Can information security challenges be resolved?</li> <li>Will employees be accessible and accountable for generating performance results from remote locations?</li> </ul>	<ul style="list-style-type: none"> <li>Is the employee self-directed, results oriented, and accountable?</li> <li>Is the employee able to work Independently and collaboratively with a virtual team? Is the employee successful in performing responsibilities?</li> <li>Can the employee establish a home office and ensure that technology (including communication systems) for effective teleworking?</li> </ul>

**B.4.iii. Effective Management and Employee Tips and Techniques  
Assessing Employee Readiness for Successful Use of Flexibilities**

Some federal agencies proactively assess an employee’s ability to work remotely as a best practice. While few tools are used that allow agencies to assess employee readiness for expanded work flexibilities, we offer a tool that could be adapted for telework and broadened to assess flexible work arrangement readiness. We look to TIGTA again as being an outstanding example of how to assess employee readiness to telework. TIGTA created its telework system, referred to as the Virtual Resource Solution (VRS), because of the need to have employees in the best location to complete work. Their program contains the best ingredients for program success: engaged and committed senior leadership, extensive training on managing a mobile workforce, employee self-assessment, management assessment and a finely honed program that is well documented.

The following questionnaire is used by TIGTA as a guide for managers evaluating an employee’s potential for participation in the VRS.<sup>14</sup> As mentioned, an employee self-assessment questionnaire is also included as part of the selection process. This questionnaire assesses an individual’s work characteristics, work habits and competencies to determine whether they should work in a remote or alternative location. The manager should address and discuss the completed questionnaire with the employee. Some managers give the employee a copy of the questionnaire to complete in advance of this discussion. Once the discussion occurs and an agreement is reached on the responses to the questionnaire, a copy of the completed questionnaire is provided to the employee.

As mentioned, this same process could expand the use of flexible work arrangements such as part-time work and job sharing.

**Employee Assessment Questionnaire**

Employee Name: \_\_\_\_\_

Employee Position: \_\_\_\_\_

**1. Provide a brief summary of employee’s duties and responsibilities.**

**2. Evaluate the following work characteristics according to the employee’s existing job function.**

	Low	Medium	High
Clarity of goals and objectives for the position			
Ability to schedule face-to-face contact (meetings, etc.) on certain days of the week			
Degree to which communications can be accomplished using voice mail, e-mail, faxing, electronic file transfer			
Ability to control workflow or schedule			
Reliability of technology to support employee when teleworking			

*If your responses were primarily in the medium to high columns, this employee is likely to be a successful teleworker.*

<sup>14</sup> Treasury Inspector General for Tax Administration, *A Manager’s Guide to Virtual Resource Solution*, undated.

**3. Evaluate the following work characteristics according to the employee’s existing job function.**

	Low	Medium	High
Amount of in office face-to-face contact required			
Amount of in-office reference materials of other resources required			
Impact on work team when employee is teleworking			

*If your responses were primarily in the low to medium columns, this employee is likely to be a successful teleworker.*

**4. Evaluate the employee’s work style and level of performance characteristics.**

	Low	Medium	High
Level of job knowledge			
Experience on current assignment			
Level of organizing and planning skills			
Need for supervisor and/or frequent feedback			
Self-discipline regarding work			
Reliability concerning work hours			
Level of productivity			
Quality of work product			
Computer literacy			
Flexibility			

*Your response ratings to the questions above depend on the critical nature of the work style and performance characteristics of the employee’s existing job. If your responses were primarily in the medium to high columns, this employee is likely to be a successful teleworker.*

**5. Evaluate the employee’s work style and level of performance characteristics.**

	Low	Medium	High
Resistance to change			
Need for interpersonal office contact			
Importance of co-worker input to successful job performance			

*If your responses were primarily in the low to medium columns, this employee is likely to be a successful teleworker.*

**6. Does this employee work with information, data or materials requiring secure or special handling?**

- Yes
- No

**7. Rate your willingness to let this employee participate in VRS.**

- Not willing
- Have reservations (but willing)
- Completely willing

**8. If you indicated the first or second option above, please state your reasons below.**

---

Supervisor Signature

Date

---

Employee's Acknowledgement

Date

### B.5.i. Sample Job Announcement that Addresses Telework Eligibility

Flexible work arrangements are effective in recruiting top talent to federal service. We know that both entry-level and experienced job candidates are looking for positions that afford work flexibility. Below is an example of a job announcement from the Centers for Disease Control and Prevention that highlights telework eligibility. Using this approach to lay the groundwork for part-time work and job sharing consideration is a strategic way to broaden the scope of top job applicants.

**USAJOBS**  
SEARCH FOR AMERICANS

Search Jobs | Account Top | My Alerts | My Applications | My Dashboard | My Profile | My Settings | My History | My Favorites | My Bookmarks | My Notifications | My Alerts | My Applications | My Dashboard | My Profile | My Settings | My History | My Favorites | My Bookmarks | My Notifications

Back to Results | OVERVIEW | DUTIES | QUALIFICATIONS & REQUIREMENTS | BENEFITS & OTHER INFO | HOW TO APPLY

**Health - Human Services**  
U.S. DEPARTMENT OF HEALTH & HUMAN SERVICES

**Job Title:** Health Policy Analyst, GS-0275-11/12  
**Department:** Department of Health and Human Services  
**Agency:** Centers for Disease Control & Prevention  
**Sub-Agency:** Department of Health and Human Services - CDC  
**Job Announcement Number:** HHS-CDC-01-2010-0263

**SALARY RANGE:** \$55,734.00 - \$81,313.00 /year  
**OPEN PERIOD:** Monday, June 07, 2010 to Monday, June 21, 2010  
**SERIES & GRADE:** GS-0301-11/12  
**POSITION INFORMATION:** Full Time/Permanent  
**PROMOTION POTENTIAL:** 13  
**DUTY LOCATIONS:** 3 locations - Atlanta, GA  
**WHO MAY BE CONSIDERED:** This job is open to U.S. citizens. You do not need current or prior federal experience to apply for this position.  
 This vacancy is being announced concurrently under merit promotion (MP) announcement number HHS-CDC-01-2010-0263, open to current federal employees serving under a career or conditional appointment; former federal employees with reinstatement eligible; and persons, including veterans and certain military spouses, eligible for appointment under special hiring authorities.  
 Candidates who wish to be considered under both procedures **MUST** apply under both vacancy announcements.

**Agency Information:**  
 Department of Health and Human Services - CDC  
 4770 Buford Highway  
 Atlanta, GA 30341  
 Fax: 866-539-4466

**Questions about this job:**  
 242 Customer Service  
 Phone: 770-488-1722  
 Fax: 866-539-4466  
 TDD: 770-488-1228  
 Email: hhs@cdc.gov

**Job Announcement Number:** HHS-CDC-01-2010-0263  
**Control Number:** 1511054

**JOB SUMMARY:**  
 What exciting opportunities await you at CDC?  
 The Centers for Disease Control and Prevention (CDC) is the agency Americans trust with their lives. As a global leader in public health, CDC is the nation's premier health promotion, prevention, & preparedness agency. Whether we are protecting the American people from public health threats, responding emerging diseases, or maintaining public health programs across our domestic and international partners, we rely on our employees to make a real difference in the health and well-being of people here and around the world.  
 CDC supports the use of telework as a way to help attract and retain talented individuals in public service, increase worker productivity, and better prepare the agency to operate during emergencies. Telework supports the agency's sustainability efforts by reducing energy use, greenhouse gas emissions, and traffic congestion. This position may be authorized for telework. Telework eligibility will be discussed during the interview process. While routine participation in the telework program is voluntary, situational telework may be required in the event of an emergency.  
 The incumbent serves as a health policy analyst to senior leadership with responsibility for providing leadership, direction, and management for the organization.  
 This position is located at the Centers for Disease Control and Prevention (CDC), Office of the Chief Operating Officer (OCOO), Financial Management Office (FMO), Atlanta, GA.

CDC supports the use of telework as a way to help attract and retain talented individuals in public service, increase worker productivity, and better prepare the agency to operate during emergencies. Telework also supports the agency's sustainability efforts by reducing energy use, greenhouse gas emissions, and traffic congestion. This position may be authorized for telework. Telework eligibility will be discussed during the interview process. While routine participation in the telework program is voluntary, situational telework may be required in the event of an emergency.

## B.5.ii. Web Resources on Information Security and Remote Office Access

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Agency officials often identify security concerns as a critical obstacle to expanding remote office capacities. These resources are included to help determine solutions to information security challenges that face federal agencies.

The following sections provide agencies with additional resources to further inform the reader on telework and telework security related information. NIST provides a detailed description of an infrastructure life cycle that provides five-phases of detailed guidance. Please refer to NIST SP 800-64, Security Considerations in the System Development Life Cycle, for more information.

### Resources

Home Network Security

[http://www.us-cert.gov/reading\\_room/home-network-security](http://www.us-cert.gov/reading_room/home-network-security)

Information for New and Home Users

<http://www.cert.org/homeusers>

Intragency Telework Site

<http://www.telework.gov>

Security at Home

<http://www.microsoft.com/protect/default.aspx>

Stay Safe Online

<http://www.staysafeonline.info>

NIST SP 800-46 Revision 1, Guide to Enterprise Telework and Remote Access Security: Recommendations of the National Institute of Standards and Technology

<http://csrc.nist.gov/publications/nistpubs/800-46-rev1/sp800-46r1.pdf>

NIST SP 800-40 Version 2.0, Creating a Patch and Vulnerability Management Program

<http://csrc.nist.gov/publications/nistpubs/800-40-Ver2/SP800-40v2.pdf>

NIST SP 800-48 Revision 1, Guide to Securing Legacy IEEE 802.11 Wireless Networks

<http://csrc.nist.gov/publications/nistpubs/800-48-rev1/SP800-48r1.pdf>

NIST SP 800-52, Guidelines for the Selection and Use of Transport Layer Security (TLS) Implementations

<http://csrc.nist.gov/publications/nistpubs/800-52/SP800-52.pdf>

NIST SP 800-53 Revision 2, Recommended Security Controls for Federal Information Systems

<http://csrc.nist.gov/publications/nistpubs/800-53-Rev2/sp800-53-rev2-final.pdf>

NIST SP 800-53 Revision 3 (Draft), Recommended Security Controls for Federal Information Systems and Organizations

<http://csrc.nist.gov/publications/PubsSPs.html>

NIST SP 800-55 Revision 1, Performance Measurement Guide for Information Security

<http://csrc.nist.gov/publications/nistpubs/800-55-Rev1/SP800-55-rev1.pdf>

NIST SP 800-58, Security Considerations for Voice Over IP Systems

<http://csrc.nist.gov/publications/nistpubs/800-58/SP800-58-final.pdf>

NIST SP 800-63 Version 1.0.2, Electronic Authentication Guidelines  
[http://csrc.nist.gov/publications/nistpubs/800-63/SP800-63V1\\_0\\_2.pdf](http://csrc.nist.gov/publications/nistpubs/800-63/SP800-63V1_0_2.pdf)

NIST SP 800-63-1 (Draft), Electronic Authentication Guidelines  
<http://csrc.nist.gov/publications/PubsSPs.html>

NIST SP 800-68 Revision 1, Guide to Securing Microsoft Windows XP Systems for IT Professionals  
[http://csrc.nist.gov/itsec/download\\_WinXP.html](http://csrc.nist.gov/itsec/download_WinXP.html)

NIST SP 800-69, Guidance for Securing Microsoft Windows XP Home Edition  
[http://csrc.nist.gov/itsec/guidance\\_WinXP\\_Home.html](http://csrc.nist.gov/itsec/guidance_WinXP_Home.html)

NIST SP 800-77, Guide to IPsec VPNs  
<http://csrc.nist.gov/publications/nistpubs/800-77/sp800-77.pdf>

NIST SP 800-83, Guide to Malware Incident Prevention and Handling  
<http://csrc.nist.gov/publications/nistpubs/800-83/SP800-83.pdf>

NIST SP 800-88, Guidelines for Media Sanitization  
[http://csrc.nist.gov/publications/nistpubs/800-88/NISTSP800-88\\_rev1.pdf](http://csrc.nist.gov/publications/nistpubs/800-88/NISTSP800-88_rev1.pdf)

NIST SP 800-97, Establishing Wireless Robust Security Networks: A Guide to IEEE 802.11i  
<http://csrc.nist.gov/publications/nistpubs/800-97/SP800-97.pdf>

NIST SP 800-111, Guide to Storage Encryption Technologies for End User Devices  
<http://csrc.nist.gov/publications/nistpubs/800-111/SP800-111.pdf>

NIST SP 800-111, Guide to Storage Encryption Technologies for End User Devices  
<http://csrc.nist.gov/publications/nistpubs/800-111/SP800-111.pdf>

NIST SP 800-113, Guide to SSL VPNs  
<http://csrc.nist.gov/publications/nistpubs/800-113/SP800-113.pdf>

NIST SP 800-114, User's Guide to Securing External Devices for Telework and Remote Access  
<http://csrc.nist.gov/publications/nistpubs/800-114/SP800-114.pdf>

NIST SP 800-115, Technical Guide to Information Security Testing and Assessment  
<http://csrc.nist.gov/publications/nistpubs/800-115/SP800-115.pdf>

NIST SP 800-118 (Draft), Guide to Enterprise Password Management  
<http://csrc.nist.gov/publications/PubsSPs.html>

NIST SP 800-122 (Draft), Guide to Protecting the Confidentiality of Personally Identifiable Information (PII)  
<http://csrc.nist.gov/publications/PubsSPs.html>

NIST SP 800-123, Guide to General Server Security  
<http://csrc.nist.gov/publications/nistpubs/800-123/SP800-123.pdf>

NIST SP 800-124, Guidelines on Cell Phone and PDA Security  
<http://csrc.nist.gov/publications/nistpubs/800-124/SP800-124.pdf>

Using Wireless Technology Securely  
[http://www.us-cert.gov/reading\\_room/Wireless-Security.pdf](http://www.us-cert.gov/reading_room/Wireless-Security.pdf)

## APPENDIX C: PARTICIPATING ORGANIZATIONS AND INDIVIDUALS

The Partnership for Public Service and Booz Allen Hamilton would like to thank the following individuals and organizations for their participation in this study.

### Federal Organizations

#### American Federation of Government Employees

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