

Sample Flex Work Proposals

Sample Proposal #1—Reduced Hours

DATE: **October 30, 2002**

TO: **Mary Smith**
 Director, Business Services

FROM: **Jane Doe**
 Office of Financial Services

RE: **Flexible Work Arrangement Proposal**

Dear Mary,

Enclosed you will find a written proposal to request a flexible work arrangement. As you are aware, this issue is extremely important to me. I hope you will consider my ideas in obtaining a balance that could prove beneficial to the department and allow me time to address personal issues. I would like to propose a 90-day trial period, with an informal evaluation mid-way (at about 6 weeks) and at the end of the period to see how well it is working.

Please contact me if you should have any questions. Thank you for your consideration.

Flexible Work Arrangements Proposal: Sample

I have been employed at the University for 8 years and am very committed to the quality of my work. Lately, I have been finding it increasingly difficult to address some family issues due to my full-time work schedule. In addition, I have a commute time of 45 minutes from Monroe. My ability to balance work and family needs would be greatly enhanced by reducing my hours to 80% time. I believe that I will be more effective and focused when I am at work, and my family would benefit from the additional day I could spend at home addressing their needs.

This is a formal request for a reduction in my work schedule from 100% to 80% time. I propose a work schedule of Monday – Thursday (or any 4 agreed upon work days) from 8:00am – 5:00pm. This schedule would help me balance my work and family responsibilities more effectively.

The following represent possible issues as well as solutions due to my reduction in time:

Systems Coordination & Training:

Issue: Departmental response to questions regarding REX and POTS might be delayed.

Solution: All departments would be informed of my work schedule and I would keep Corporate Time updated to support communication of my schedule. I would train Donna to act as my backup if an emergency issue were to come up, and I am willing to be contacted by cell phone in the case of any emergency.

The web page can also be used as a source of information and support for the campus community. A project I am currently working towards is incorporating a training program on the Purchasing web page. With this web page training in place, onsite training would only be necessary in dire circumstances.

Financial Reporting and Analysis:

Issue: Last minute reports would require a back-up preparer.

Solution: Most financial reporting and analysis issues have timelines already in place (e.g. budgeting, online personnel transactions, office purchasing, reconciliations), and I will continue to organize my time to support these deadlines. I already have the templates needed for such projects, and a back up preparer could be trained to support such issues if they were to arise on one of my days off. If these solutions are not sufficient, I have the ability and am willing to access my work computer from home for emergency circumstances.

Management & Supervision:

Issue: Office equipment in need of service or repair.

Solution: If office equipment should need service attention, procedures are already in place for Donna to contact the service vendor.

Supervision Issues: Who will supervise Donna on this one day per week?

Supervision Solution: As Department Manager, Randy would supervise Donna for this one day per week. When Donna has a preplanned day off, I am willing to adjust my schedule to support the need for at least one of us in the office at all times.

Other Issues: Assisting the Senior Buyer with last minute bid analyses.

Other Solution: Oscar might have to do his own complex bid analyses or administrative functions if they were needed on my day off. Alternatively, this would enable the Buyer and/or Donna to utilize recent training in software programs such as Excel, and stimulate growth in other programs used to support these administrative functions.

With effective communication and some additional pre-planning methods, my proposed 80% work schedule may benefit the department. The budgetary savings may allow Purchasing the opportunity to hire a student employee to support other areas of the department (e.g. Equipment Management). Also, this student could function, at times, as the front office receptionist, allowing Donna the opportunity to cross-train in other areas of the department.

I am willing to work with Randy and my colleagues to negotiate a schedule that will best fit the department's needs. I would like to suggest a "trial period" of 60 days. After the initial 60 days, I believe we should meet and discuss the pros and cons of the schedule to determine if departmental needs are being met.

I appreciate your consideration of this request, and would be more than happy to meet with you in person to discuss this in further detail. I look forward to hearing from you.

Sincerely,

Jane Doe
Office Manager
Office of Financial Services

Sample Flex Work Proposals

Sample Flexible work arrangement #2 -Return to Work part-time

Dear [supervisor]:

As we have already discussed, I plan to be on medical/child care leave from approximately March 10 through June 6. (Some of that time will be covered on whatever remains of my family care days, and the rest will be covered out of extended sick time, according to our HR and Payroll.) I expect that I will need six weeks of medical leave, depending on what my doctor orders. I have 2.5 weeks of vacation, and I will take 4 weeks of unpaid leave, which as I understand will be covered by the Family Medical Leave act, which will continue coverage of my University benefits.

I would like to propose the following schedule for my return to work:

June 9-August 25 20 hours per week

August 29-October 2 30 hours per week

October 5 Back to full time status

I would be happy to approach the return to work on a trial basis and schedule an evaluation at the mid-way point so we can talk about how well it is working, or if there are issues that need addressing. I have contacted the U-M's Work/Life Resource Center, and they have indicated a willingness to provide information to both of us on the kinds of considerations that we may need to address.

I have given a lot of thought to how my absence would impact the department and our customers, and have the following suggestions to submit for discussion during our regular supervisory meeting next Tuesday. I wanted to put them in writing to make sure you had a chance to think about them before our meeting.

Supervision of Office:

It is essential that we have someone who is very familiar with the daily operations of the office and the various staff functions. I would propose that Kay step into that role during my absence. She is familiar with the budget and all the forms that will need processing, as well as the many deadlines we face with our reports, grants. Kay is bright, capable, and seems to have an excellent rapport with other staff. I believe it would be advantageous to spend the time training her, as we all agree she is supervisory material and would probably benefit from having this cross-training. Her routine secretarial duties that she would need help with, in terms of her workload, could be handled by two of our work-study students, and assisted by Cheryl the receptionist. That would free her up to do the reports and the higher-level tasks that she now performs. Her routine secretarial duties that she would need help with, in terms of her workload, could be handled by two of our work-study students, and assisted by Cheryl the receptionist. That would free her up to do the reports and the higher-level tasks that she now performs.

Additionally, both Kay and Cheryl are taking long vacations just prior to my leave, so I do not anticipate that there will be a coverage problem during the summer.

My job duties:

At present, I spend 10% of my time doing “x”; 30% doing “y”; 20% doing “z”; and the remainder doing “a, b and c.” If you decide that Kay would be a logical person to have as office supervisor, I believe she could capably handle “x” and “z”, in addition to her other duties. I believe we might be able to hire a half-time temp to assist with basic duties, such as answering phones, distributing mail, and providing reception coverage when Paula is away on vacation or sick. I would be happy to train that person if s/he is hired before I leave, or leave explicit instructions for Kay, who could also train him/her. I have talked with Bernadette in Temporary Staffing Services, and she assures me that there is a good pool of capable temps right now that are looking for part-time work. She also assures me that we can do all of the paperwork online.

As you know, we have extra money in the budget from between the time we lost Jane to the time we hired Michelle, so I don’t think this expense will have any major impact on our budget.

I plan to have all the budget accounts up to date before I leave, and again, Kay is already trained in M-pathways, so she can step right in. If she needs help, the Accounts Manager at the Tower is very accessible and helpful.

Thank you very much for considering this proposal. My job is extremely important to me, and as you know I take great pride in the work that I do. I feel this schedule will be mutually beneficial, and create a “win-win” situation for all. I heard Mary Sue Coleman at the presentation on Woman in Science and Engineering the other day make the case for a “family friendly” institution, and I’m sure that our department will want to be out in front, as a model for other departments.

I look forward to discussing this with you on Tuesday.

Sincerely,

Marilee Blooming

Sample Telecommuting Proposal

To: Jerry Rigged
From: Sam Hester
Date: 12/4/02
Re: Telecommuting Proposal

Employers nationwide are embracing a practice that improves employee morale, increases productivity and helps employee retention. Telecommuting (also called telework or flexplace) is contributing to the bottom line—cost savings and increased productivity— while providing flexibility for employees.

I am interested in exploring the possibility of working from home two days per week. I have taken the time to research what other employers have done to allow this privilege and I hope you will consider my request based on my past performance and my contributions to the department. Moreover, given my past telecommuting experiences (Anderson consulting, contractual projects, etc.), I believe I am an especially suitable candidate for a telework arrangement. I would like to meet with you in the next couple of weeks to discuss this proposal and share how a telework arrangement would be mutually beneficial.

You may have concerns regarding my accessibility to you, customers and co-workers, and my ability to work independently while at home. My proposal addresses how employers have resolved issues regarding measurement tools and contact arrangements, as well as other details of a telework arrangement.

I propose that we begin by trying telecommuting two days a week for 90 days starting on 1/6/03, then evaluating my quality of work and productivity. At that point, we can determine whether I might be able to continue with that schedule.

Before we meet, please consider the following:

1. **I believe I can be more productive at home.** Studies show that teleworkers are typically able to get 10 to 30 percent more work done due in large part to the reduced number of interruptions they encounter compared to a normal day in the office.
2. **Technology can make it happen.** With technologies currently utilized by XYZ staff, I can have access on my home computer to the files housed on my office

computer. I can use e-mail and the phone to remain in contact and very accessible to you, customers and co-workers.

3. **By offering telework, our department is more likely to retain valuable employees and improve customer satisfaction.** Research indicates that employees who have the flexible work option of telework are happier and feel more valued by their employer, making them less likely to look elsewhere for employment. Providing this opportunity for greater work/life balance creates a happier employee. Happier employees tend to be more satisfied, productive, and loyal employees and have been directly correlated with improved customer satisfaction.
4. **Telework is working for UM departments.**
 - Divisions utilizing telework arrangements include BTM and JRC. Telecommuting is not a new concept within our department and is most often associated with staff that have: a) access to the necessary technologies, and b) proven their ability to work independently and responsibly.
 - Other Campus Departments – Per the UM Work/Life Resources Program, UMHS is one of the most active UM areas utilizing and/or exploring work/life initiatives like telework.
 - ITCS – This UM IT department has had in place a telecommuting program since 1998. A total of 15 telecommuters (full-time and part-time resources) have participated in the program. Organizational benefits gained through the program include enhanced employee retention, reduced office space expense and increased productivity. Report from six-month pilot (<http://www.itd.umich.edu/telecommuting/pilot/policy.html>) reviewed and approved by UM Human Resources and Affirmative Action, Risk Management, and General Counsel's Office.

I have outlined how I envision a telecommuting arrangement will work for me and for our department.

Communication

I will be available and accountable during our regular office hours. I will keep in contact with you, customers and my co-workers via my home phone, cell phone and/or e-mail. My work voicemail message will refer callers to my home phone without explicitly referring to the number has a home number.

Information Sharing

I will transfer files to and from the office via e-mail programs, modem transfers, and/or floppy disks that support the highest degree of confidentiality based on the available technology utilized by our department.

Job Tasks and Reporting

The elements of my job responsibilities that I consider appropriate for remote work include research, writing, project planning, Remedy help ticket investigation/resolution

and meeting preparation. Each week I will create a status report outlining what I expect to complete on my telework days and how much time I anticipate spending on each task. At the end of my telework days I will report what I have completed to you as part of the weekly status report created by Russell Crow. I will also save the tasks that are best done without interruption for my telework days.

Connectivity

I propose utilizing department-supported software to connect my home computer to my desktop at the office (example: PC Anywhere) which would give me access not only to files on my desktop at the office, but also to shared files and programs housed on the network. As files are completed I will transfer them back to the office via file transfers, via e-mail or on a floppy disk.

Schedule

For the 90-day trial period, I propose working from home on Mondays and Fridays of each week. I have reviewed my meeting schedule and workload over the past several weeks and conclude that Mondays and Fridays are most appropriate and it would have the least impact on coverage and attendance at scheduled meetings. This is particularly appropriate given that the current work schedule of other team members makes office attendance Tuesday, Wednesday and Thursday especially important. If an important meeting or event comes up, I would be willing to come into the office. I would propose attending other meetings by conference calls with your support.

Equipment

In my home I have an area dedicated as a home office. I will use my personal computer, modem, and Internet connection to perform my job functions and keep in contact with you, customers and co-workers. I would be open to an office inspection by you or someone else from UM if that would help you feel comfortable about my working environment and to confirm that it meets UM ergonomic guidelines. I would also be open to using a laptop provided by the department if you would prefer that I not use my personal computer.

Thank you for considering my proposal. I will be in touch soon to schedule a meeting to talk about the possibility of making telecommuting work for us.

If you're interested in more information about telework, please let me know as I have additional information about the benefits gained by telework arrangements as well as ways to resolve common objections. In addition, you may want to contact Leslie De Pietro (936-8469; ldpietro@umich.edu) from the UM Work/Life Resources Program. Leslie has been a very helpful in developing this proposal and is knowledgeable about telecommuting efforts throughout UM. In particular, Leslie can share information regarding efforts to promote telework by the UM Great Places to Work Initiative and discussions with President Mary Sue Coleman to explore ways to support telework and other work/life programs.

Thank you for your time and consideration.