TRANSPORTATION RESEARCH BOARD

TRB Webinar: Managing the Shift to a Flexible Work Future

May 20, 2024

1:00 - 2:30 PM



PDH Certification Information

1.5 Professional Development Hours (PDH) – see follow-up email

You must attend the entire webinar.

Questions? Contact Andie Pitchford at TRBwebinar@nas.edu

The Transportation Research Board has met the standards and requirements of the Registered Continuing Education Program. Credit earned on completion of this program will be reported to RCEP at RCEP.net. A certificate of completion will be issued to each participant. As such, it does not include content that may be deemed or construed to be an approval or endorsement by the RCEP.



Purpose Statement

This webinar will discuss the challenges, risks, and considerations of telecommuting, remote work, and hybrid schedules. Presenters will share mitigation strategies for both organizational and employee barriers. Presenters will also provide practical tools to help measure organizational readiness to implement flexible work arrangements, determine employee and job suitability for telework, and manage remote employees.

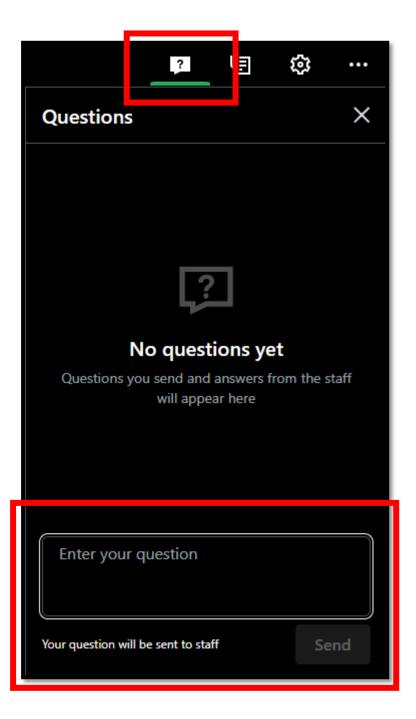
Learning Objectives

At the end of this webinar, you will be able to:

- Assess readiness to implement flexible work arrangements and determine appropriate mitigation strategies for identified challenges, risks, or barriers
- Examine employee and job suitability for flexible work arrangements
- Manage employees that participate in flexible work arrangements, including measuring performance and productivity while remote

Questions and Answers

- Please type your questions into your webinar control panel
- We will read your questions out loud, and answer as many as time allows



Today's Presenters



Stephanie Brown

Stephanie.Brown@icf.com

ICF



Jackie Marhefka <u>Jacqueline.Marhefka@icf.com</u> *ICF*



Beth Heinen

Beth.Heinen@icf.com

ICF



Chelsey Jackson chelsey.jackson@icf.com
ICF





Managing the Shift to a Flexible Work Future



Dr. Beth Heinen Chelsey Jackson, M.P.S Dr. Jackie Marhefka Dr. Stephanie Brown

Introductions







Chelsey Jackson, M.P.S Senior Manager, Organizational Development



Dr. Jackie Marhefka Manager, Human Capital



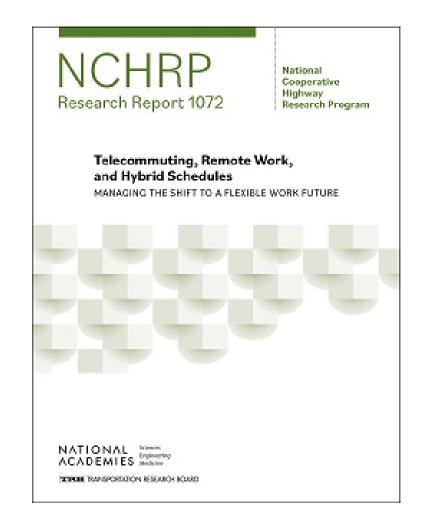
Dr. Stephanie Brown

Lead Human Capital

Consultant

Agenda

- Introduction and Background on Telework and Flexible Work Arrangements
- Implementing Flexible Work Arrangements
- Measuring Performance and Productivity while Teleworking
- Q&A



Poll Question

• Are you with:

- A. State DOT
- B. Federal Government
- C. University
- D. Other



Poll Question

- How has telework or other flexible work arrangements been implemented at your agency/organization?
 - A. They have been implemented at the agency/organization level.
 - B. They have been implemented at the team/unit level.
 - C. They are inconsistently implemented.
 - D. They have not been implemented.



Introduction and Background on Research and Flexible Work Arrangements

Background and Goals of the Research

Background: The COVID-19 pandemic and quarantine orders required state DOTs to quickly shift to telework and flexible work arrangements (FWAs) without the luxury of extensive planning and thorough examination of job and employee suitability for successful remote work.

Need: Help state DOT leadership, management, and employees consider long-term and wide adoption of FWAs by developing user-friendly resources to help assess the suitability of employees and positions for FWAs and support reporting to agency leadership.

Research Conducted – Literature Review

Conducted Literature Review

Reviewed literature to:

- Synthesize existing knowledge of FWAs
- Understand recent state DOT experience with FWAs
- Identify successful practices and key considerations



Research Conducted - Interviews

Facilitated Interviews

- Identified state DOT contacts with telework experience or expertise
- Conducted interviews to understand the benefits, challenges, and risks associated with telework within state DOTs
- Identified best practices for evaluating success and potential criteria to determine suitability

- •North Dakota DOT (NDDOT)
- •Wyoming DOT (WYDOT)
- •Vermont Agency of Transportation (VTrans)
- •Washington State DOT (WSDOT)
- •California DOT (Caltrans)
- •Louisiana DOT & Development (Louisiana DOTD)
- •Arkansas DOT (ARDOT)

Benefits and Challenges for State DOTs

Benefits

- Cost savings
- Productivity and performance
- Employee engagement
- Work-fife balance
- Safe workspace
- Accessibility accommodations
- Recruitment and retention

Challenges

- Inconsistent implementation
- Required in-person tasks
- Manager discretion
- Monitoring performance and productivity

Telework and Other FWAs

Telework Options

Full-Time Telework

Often called remote work, telework includes employees working exclusively away from the office/site every day.

Ad Hoc Hybrid Telework

Ad hoc hybrid telework is when an employee works primarily in the office/on site but can potentially telework with approval on an as-needed basis.

Hybrid Telework

Hybrid telework
involves an
established schedule
where an employee
works some days in
the office/on site and
works remotely on
other days.

Alternatives to Telework

Flexible Time

- •Employee flexibility to decide when they start and end their workdays, typically around a set of core hours.
- •This allows them to work during their preferred working hours (e.g., early in the morning) and avoid long commutes.

Part Time

- •Part-time work involves the employee working less than 40 hours per work week.
- •This allows employees to maintain employment while balancing personal time or demands (e.g., school, family, non-paid work).
- •The organizations can use this option to hire or retain valued staff as well as provide support to other employees with high or fluctuating demands.

Job Sharing

- •More than one employee shares or divides the duties of one full-time position.
- •This can allow the organization to meet the demands of a full-time position while hiring employees who might not otherwise be able to commit to a full-time job.

Compressed Work Week

- •Often referred to as 4-10s or 9-9s, this practice allows the employee to work more hours in a workday to work a lower number of workdays (e.g., four 10-hour workdays with one day off every week, nine 9-hour workdays with one day off every other week).
- •This allows the employee to have more consecutive days off, which can be valuable to the employee, but this does not offer as much flexibility for unexpected events/emergencies.

Implementing Flexible Work Arrangements

Products Developed from the Research

1. Guide



Chapter I. Introduction

- Telework Options
- Benefits and Challenges of Telework
- Organizational Readiness
- Alternatives to Telework
- Best Practices



Chapter II. Telework Tools

- Telework Suitability Tool
- Tracking Tool
- Instructions



Chapter III. Measuring Performance and Productivity

- Best Practices for Monitoring and Measuring Productivity and Performance
- Metrics for Measuring Telework Program Effectiveness

2. Telework Suitability Tool

For assessing employee suitability for telework

3. Tracking Tool

For monitoring FWA requests, decisions, and established arrangements



TELEWORK

Telework, also known as remote work, is on the rise, particularly after the COVID-19 pandemic. It is a flexible work arrangement in which employees are able to work from somewhere other than the traditional workspace, such as their home office, which can help address life demands and improve work-life balance. Although the most common telework location is an employee's home, an employee can also telework from a satellite office or another offsite location. While telework can

When a telework program is in place, it provides the opportunity for employees to work remotely using technology such as the internet, computer software (e.g., virtual private networks - VPNs), video conferencing, and phone systems. As described below, telework programs can be implemented differently based on the needs of organizations and employees

IMPLEMENTING TELEWORK



Full-time telework includes always working away from the office/work site, and only working in site occasionally for specific meetings or events. This option allows employees to work from the co and eliminate a long commute to/from work



When hybrid telework is implemented, an employee both teleworks and works in the throughout the week. This may involve following a set schedule every week in which they telework the office/site on scheduled days (e.g., M/W/F in office and T/TH telework) but can also be less that employee choose when they telework.



Ad hoc hybrid telework is when an employee almost always works in the office/on-site but ca needed or under special circumstances such as writing a report, completing a virtual training

Best Practices

- · The agency should clarify which jobs are suitable for each telework arrangement.
- Clear expectations and goals should be set for when employees are teleworking, particularly employee should communicate with their manager and client(s).
- Ensuring appropriate resources are in place to support employees while working remotely is cri include the technology needed and guidance documentation to help ensure success.

- Cost savings for both the employee (e.g., gas from lack of commute) and the organization (e.g., reduced utility
- Organizations can hire individuals outside of the local commuting area, which expands the potential applicant
- Improves work-life balance and employee
- Increases productivity due to fewer distractions comfortable environment, and no commute.
- Increases ability to meet accessibility needs
- · Decreases workplace violence, discrimination, workrelated injuries, and harassment

- Ensuring the employee and manage necessary resources to effectively tel supervise remotely can be difficult. E the requisite technology to successfi managers should be trained on how t employee who teleworks
- Managers often struggle to supervise cannot see or meet with in-person. S find it difficult to assess progress and

NCHRP 23-13(01): Part II - Guide Chapter I - Introduction



Working with a union, gaining buy-in, monitoring performance and productivity, and lack of social interaction are primary challenges identified with telework.

Challenge

Working with a union

A union's primary concern is equity for all, however in an effort to be equal, this can result in programs or initiatives being "all or nothing," meaning even employees that may be suitable cannot participate because not all employees can.

Gaining buy-in

Gaining buy-in, particularly for nanagers and leadership, is critical to any large implementation. Managers and leaders may be skeptical that telework will work in the organization and that employees will be as productive.

Measuring performance and productivity

One of the largest barriers to implementing a telework program is that managers and leaders feel they cannot effectively measure an employee's performance and productivity when they are not in the office/on-site

Lack of social interaction When telework is implemented, employees can miss the social interaction they experienced when in the office/on site

Mitigation Strategy

Unions should be involved in the planning of telework programs, such as being involved in a telework committee, to acknowledge, respond, and incorporate their concerns

This can help shift away from an "all or nothing" paradigm

Gather research and benchmark data on how other organizations (particularly other state DOTs) are implementing telework, listening to employees, and incorporating their input, providing training, and providing clear rationale for the telework policy.

Provide information and resources for measuring performance and productivity to alleviate their discomfort

See Chapter III for best practices for performance management.

Facilitate these interactions through organizing periodic in-person events or meetings, creating a virtual water cooler where employees can post notes, photos, and chat informally, and implement more frequent manger check-ins to help maintain employees' connection to the organization.

One-pagers for each telework option and alternatives to telework that provide a high-level overview, potential benefits, challenges, and implementation best practices for each.

Benefits of telework including in-depth information and research related to the recruitment and retention benefits for state DOTs.

Challenges and mitigation strategies including working with a union, gaining buy-in, measuring performance and productivity, and addressing the lack of social interaction.

Determining organizational readiness for telework, implementation actions, and an organizational readiness checklist.

Common practices of telework implementation and best practices to strive for.



Chapter I. Introduction Figure 5. Organizational Readiness Checklist Secure buy-in at all levels Gain buy-in at all levels through clear and consistent communication that shares the rationale of the telework policy, supporting research and data, and provide resources and training. In this stage it is also important to listen to employees' feedback and concerns and adjust the policy accordingly. Develop and distribute policy Create a policy that includes what the policy is, stipulations, requirements, suitability conditions, approval process, and implementation guidelines, and clearly communicate the policy to all employees through email, on a shared site/drive, and/or through manager conversations. Create an implementation plan Develop a plan to implement the telework policy that includes the goals, communication strategies, and implementation steps including timeline, resources, and point of contact for Develop a communications campaign Effective communication is critical to the success of any new program or initiative. A communications campaign should include the target audience of the communications, intended outcomes, key messages, communication medium or vehicle, and timeline. Provide training, particularly to managers, on how to supervise an employee who is teleworking or when the manager is teleworking. The training should include many of the guidance in this resource including facilitating check-in meetings, measuring performance and productivity, and addressing employee concerns (see Chapter III). Identify suitability Managers should use the Telework Suitability Tool and conversation guidance (see Chapter II) to determine if their direct report is suitable for telework or other FWAs. Develop list of support contacts Create a list that that outlines who an employee should reach out to for specific concerns, particularly technical issues, while teleworking. This list should be communicated to employees and easily accessible to them. Develop a telework agreement An agreement between the employee and manager (and any other levels of approval needed) should be developed before implementing the telework arrangement. The organization should develop a standard template where the employee and manager can include details such as the telework arrangement, schedule, work hours, performance expectations and standards, and communication protocols. Begin implementation by introducing telework to one department/business unit at a time. A phased approach allows the organization to incorporate lessons learned from previous phases into the next phase of the implementation.

Telework Suitability Tool

- Used by managers to determine if their employee is suitable for a telework arrangement
- Manager responds to a series of questions with "yes (most of the time)" or "no," and in some cases, "at times"
- Once all questions are answered, the tool will populate one or more potential telework options

	Telework Suitability Tool			
	Choose a response to each question to determine if the employee or position may be suitable for a telework arrangement. Response options include yes, no, and in some cases, at times. Respond yes if the answer to the question is at lease most of the time.			
		Choose a response:		
1	Does the employee's position have tasks that require a physical presence in the office? (e.g., answering phones, sending/sorting mail, monitoring in-person activities, facilities responsibilities)			
2	Does the employee's position require face-to-face interaction with customers?			
3	Does the employee's position require face-to-face interaction with colleagues?			
4	Does the employee's position require in-office or field equipment to do their job?			
5	Are there any limitations or restrictions with the employee completing their work through a computer?			
6	Does the employee's position have security requirements that may limit the ability to telework? (e.g., working with PII, handling blueprints, printing confidential information)			
7	Are there any limitations or restrictions with the tools, technology, or resources the Department currently has to support telework? (e.g., laptops, VPN/access to network, access to work email)			
8	Do you have any concerns with the employee's ability to travel into the office or field when necessary?			
9	Do you have concerns with the employee's workspace at home? (e.g., suitable and safe physical space, reliable internet connection)			
10	Do you have concerns with the employee's performance?			
11	Do you have concerns with the employee's communication skills? (e.g., communicates expectations, provides updated on progress of work, responds timely to email and phone calls)			
12	Do you have concerns with the employee's problem-solving skills? (e.g., has the motivation to solve or find a solution to a problem independently)			
13	Do you have concerns with the employee's ability to work independently?			
14	Do you have concerns with the employe's ability to consistently meet deadlines?			
15	Do you have concerns with the employee's ability to consistently provide high quality work?			
	Based on your responses, the employee may be:	May be Suitable for Full-Time Telework May be Suitable for Hybrid Telework May be Suitable for Ad Hoc Hybrid Telework Not Suitable for Telework		

	S	
	IJ	
,	<u>ب</u>	
•	a t 10	
•	₽	
	α	
	•	
	Ţ	
	(1)	
	_	
	S 1d	
•	=	
	-	
	IJ	
	0	
,	- \	
l	_	
	_	
	$\overline{}$	
	00	
	\circ	
	_	
۰	_	

Considerations Employee

		Telework Suitability Tool
		Choose a response to each question to determine if the employee or position may be suitable for a telework arrangement. Response options include yes, no, and in some cases, at times. Respond yes if the answer to the question is at lease most of the time.
		Choose a response:
_	1	Does the employee's position have tasks that require a physical presence in the office? (e.g., answering phones, sending/sorting mail, monitoring in-person activities, facilities responsibilities)
	2	Does the employee's position require face-to-face interaction with customers?
	3	Does the employee's position require face-to-face interaction with colleagues?
	4	Does the employee's position require in-office or field equipment to do their job?
	5	Are there any limitations or restrictions with the employee completing their work through a computer?
	6	Does the employee's position have security requirements that may limit the ability to telework? (e.g., working with PII, handling blueprints, printing confidential information)
	7	Are there any limitations or restrictions with the tools, technology, or resources the Department currently has to support telework? (e.g., laptops, VPN/access to network, access to work email)
-	8	Do you have any concerns with the employee's ability to travel into the office or field when necessary?
	9	Do you have concerns with the employee's workspace at home? (e.g., suitable and safe physical space, reliable internet connection)
	10	Do you have concerns with the employee's performance?
	11	Do you have concerns with the employee's communication skills? (e.g., communicates expectations, provides updated on progress of work, responds timely to email and phone calls)
	12	Do you have concerns with the employee's problem-solving skills? (e.g., has the motivation to solve or find a solution to a problem independently)
	13	Do you have concerns with the employee's ability to work independently?
	14	Do you have concerns with the employe's ability to consistently meet deadlines?
-	15	Do you have concerns with the employee's ability to consistently provide high quality work?
		May be Suitable for Full-Time Telework May be Suitable for Hybrid Telework May be Suitable for Ad Hoc Hybrid Telework

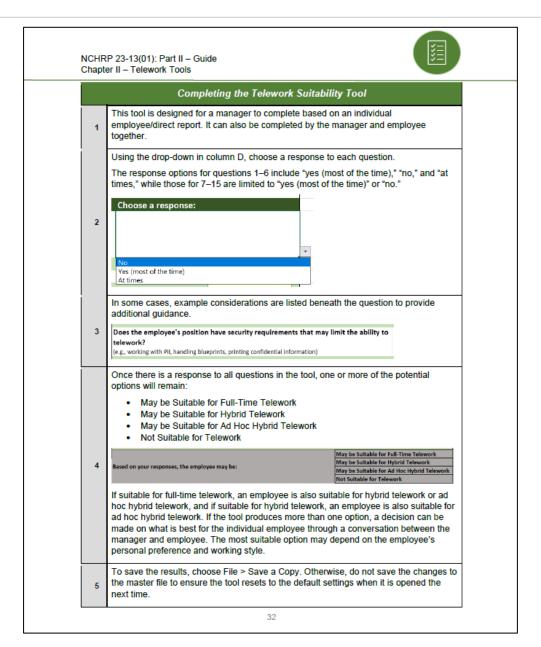


Not Suitable for Telework

Possible Telework Options

May be Suitable for Hybrid Telework May be Suitable for Ad Hoc Hybrid Telework Not Suitable for Telework

Telework Suitability Tool - Instructions



Instructions provided include:

- Completing the Telework Suitability Tool
- Telework Suitability Tool Criteria
- Editing a question in the Telework Suitability Tool
- Adding a new question to the Telework Suitability Tool
- Conversation guidance for manager and employee

Tracking Tool

Flexible Work Arrangement Tracking Tool					
Employee name	Position	Location	Unit	Telework suitability	Established arrangement/agreement
Jane Doe	Engineer	Washington, DC and home office	Unit A	Hybrid	Telework T/Th, In office M/W/F

- Track approved arrangements that employees have in place
- Data can be aggregated and used to report about telework and FWAs to agency leadership
- Instructions provided include:
 - Inputting data into the Tracking Tool
 - Changing data variables in the Tracking Tool

Managing and Measuring Performance and Productivity While Teleworking

Conversation Guidance for Manager and Employee

Conversation guidance related to:

- The results of the Telework Suitability Tool
- Finalizing telework or FWA arrangement
- Potential concerns
- Establishing norms, and/or expectations around:
 - Office/Work environment
 - Communication
 - Work hours
 - Check-in meetings
 - Pilot period

NCHRP 23-13(01): Part II – Guide Chapter II – Telework Tools



Conversation Guidance for Manager and Employee

Guidance for ad hoc hybrid telework

If an employee will mostly work in the office/on-site but may be suitable for ad hoc hybrid telework, it is critical to have a discussion and set expectations on when those ad hoc instances may occur. For example, this may include doing annual compliance training or writing a report

The manager and employee should consider the following when determining when ad hoc hybrid telework may be applicable:

- · Are there any special projects or tasks that you can advance while teleworking?
- What tasks or responsibilities do you have that are not dependent on specialty equipment, tools, or materials that are only in the office/on-site?
- Do your job responsibilities require frequent handling of secure materials or information?
- Are there aspects of your job that can be done without physically working alongside someone?

Additionally, the manager and employee will need to establish the process for requesting ad hoc hybrid telework. Consider the following:

- . How far in advance the employee must make the request.
- What information the employee needs to provide in the request.
- · Who needs to approve the request.

Once the circumstances for when ad hoc hybrid telework is established, see the "Guidance for Hybrid Telework" section.

Guidance for hybrid telework

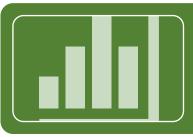
For an employee that is suitable for hybrid telework, it will be critical to have a discussion and set expectations on scheduling and telework norms. Consider the following when discussing the expectations of hybrid telework:

- The routine responsibilities/tasks that cannot be fulfilled while teleworking.
 - Tasks dependent on specialty equipment, tools, materials that are only in the office/on-site.
 - Responsibilities that require handling secure materials or information.
 - Tasks that cannot be done without physically working alongside someone.
- The impacts that the employee teleworking may have on other employees and how to minimize those impacts.

For the employee's hybrid telework schedule, the manager and employee may determine that having an established weekly schedule is the most suitable arrangement (e.g., Monday, Wednesday, and Friday in office/on-site and Tuesday and Thursday telework) or that the employee has the ability to choose the days each week that they telework.

37

Best Practices for Performance Management



Establish a Performance Baseline



Set Concrete Goals

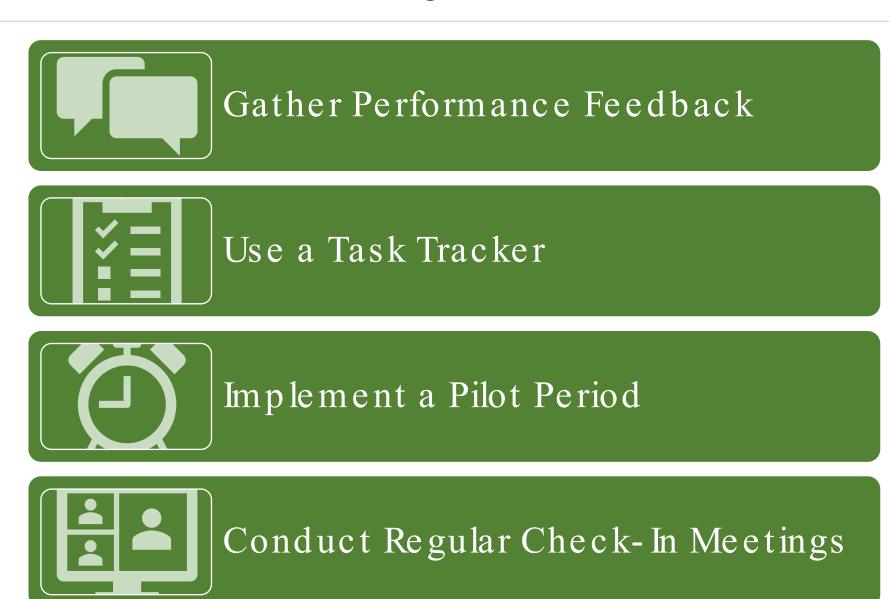


Establish Outcome-Based Measures



Create an Employee Development Roadmap

Best Practices for Performance Management



Telework Program Metrics

Recommended metrics for measuring the success of the telework program.





Metric		How to Measure	Data Source	Importance	
Indire	Indirect Measurement				
	Number of applicants An increase in individuals applying to the state DOT's open positions once telework is offered and advertised in job description.	Number of applicants for vacant positions that offer telework	HR recruitment and applicant data	An increased applicant pool for positions that offer telework can help the agency determine if telework is contributing to more interest in positions.	
Recruitment	Number of accepted employment offers Increase in the number of the state DOT's job offers are accepted.	Number of applicants who accept jobs offers for positions that offer telework	HR recruitment and applicant data Survey assessing new employee experiences and reasons for accepting offer	An increase in the number of accepted offers for positions that offer telework can help the agency determine if telework is contributing to more interest in positions. When there is an increase in accepted job offers, state DOTs can feel more confident that they are hiring the most desirable candidate.	
	Time to fill vacancies Decrease in time required to fill the state DOT's vacant positions that offer telework.	Number of days between posting and filling the position	HR recruitment data	A decrease in time require to fill positions that offer telework can help the agency determine if telework is contributing to more interest in positions. The more time a position remains open/unfilled increases the amount of time that the work of the position is potentially not being conducted.	

Telework Program Metrics

• Number of applicants Direct Measurement Number of accepted employment offers Employee Satisfaction/Experience Time to fill vacancies Cost Savings Turnover Tenure Indirect Measurement Diversity Recruitment Customer satisfaction Turnover **Customer complaints** Time to project completion Meeting Program Delivery Quality of work Employee Engagement Employee morale and engagement

Poll Question

Which tools or guidance discussed today would be beneficial to your agency/organization for implementing telework or other FWAs? (Select all that apply)

- A. One-Pagers
- B. Organizational Readiness Assessment
- C. Telework Suitability Tool
- D. Tracking Tool
- E. Conversation Guidance
- F. Best Practices for Monitoring and Measuring Productivity and Performance
- G. Metrics for Measuring Telework Program Effectiveness





For more information, visit:

https://nap.nationalacademies.org/catalog/27167/telecommutingremote-work-and-hybrid-schedules-managing-the-shift-to-a-flexiblework-future

or scan the QR code:



Today's Presenters



Stephanie Brown

Stephanie.Brown@icf.com

ICF



Jackie Marhefka

<u>Jacqueline.Marhefka@icf.com</u> *ICF*



Beth Heinen

Beth.Heinen@icf.com

ICF



Chelsey Jackson chelsey.jackson@icf.com
ICF

Upcoming events for you

May 30, 2024

TRB Webinar: When Our Technology Solutions Do Not Work for Everyone

July 15-18, 2024

TRB's 2nd Conference on Advancing Transportation Equity

https://www.nationalacademies.org/trb/ events

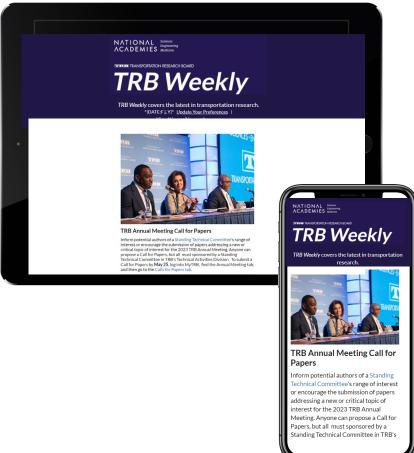


Subscribe to TRB Weekly

If your agency, university, or organization perform transportation research, you and your colleagues need the *TRB Weekly* newsletter in your inboxes!

Each Tuesday, we announce the latest:

- RFPs
- TRB's many industry-focused webinars and events
- 3-5 new TRB reports each week
- Top research across the industry



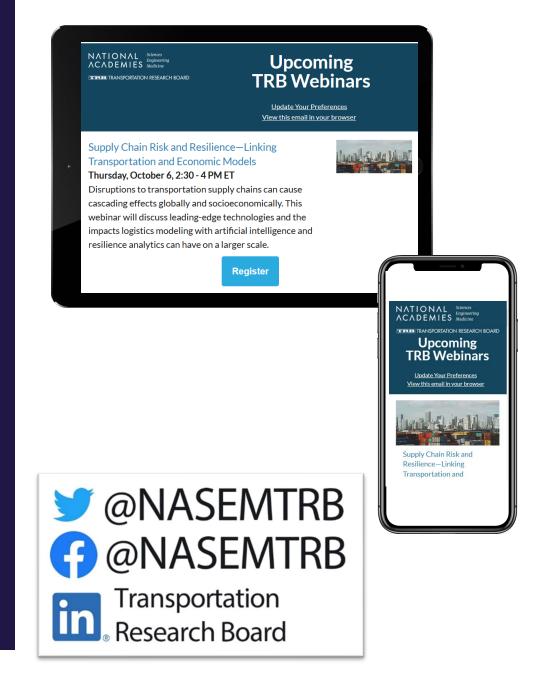
Spread the word and subscribe! https://bit.ly/ResubscribeTRB Weekly

Discover new TRB Webinars weekly

Set your preferred topics to get the latest listed webinars and those coming up soon every Wednesday, curated especially for you!

https://mailchi.mp/nas.edu/trbwebinars

And follow #TRBwebinar on social media



Get involved

TRB mobilizes expertise, experience, and knowledge to anticipate and solve complex transportation-related challenges.

TRB's mission is accomplished through the hard work and dedication of more than **8,000 volunteers**.

https://www.nationalacademies.org/trb/get-involved



