FLEXIBLE WORK PROGRAMS:

Thoughts from
Case Western Reserve and Stanford Universities

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Presentation Overview:

- Background on Flexible Work
- Case Western Reserve University “CASEworks” Program
- Stanford University “Work Anywhere” Program
- First steps in Flexible Work Development
- Flexible Work Readiness Exercise
- Conclusions
Background

What is flexible work?

- Technologies, policies and practices, which enable collaborative and other work:
  - Between different employee locations
  - Between employee locations and home or satellite offices

(Anywhere there is a device and a connection)
Background

Forces of Change

- The technology exists to enable flexible work
- Knowledge work is on the rise
- Demographics are changing
  - We see 4 – 5 generations in the workplace, each craving flexibility (of different sorts)
- We all are competing for talent (and this is world-wide)
- Cost competition is a way of life
- Environmental, political concerns abound
Background

How do these forces impact the workplace?

- Work is less likely to be in “one place” – is a connected network of places
- There is a “Kinko’s generation” – employees who work outside of traditional offices
- Flexibility attracts and retains employees
- Telecommuting is more and more common
- Sustainability concerns are everywhere
Background

What have been the primary forces of change at Case Western Reserve and Stanford?

- Less about cost and competition
- More about retention, wellness, work-life balance and the benefit of flexibility to our employees
- Also about business continuity, sustainability and community impacts
- Politics of growth
Background

Particular “Triggering” Space University Events:

- **Case Western Reserve**
  - Anticipated move to a downtown satellite campus (which has not occurred)
  - Employee retention needs

- **Stanford**
  - Moving 350 employees off campus to Stanford @ Porter Drive in Summer 2008
  - Will move up to 1,900 employees to Stanford @ Redwood City in 2012
Background

- These events led us to think about:
  - How to work in multiple locations
  - How to continue to sustain high levels of productivity and customer service
  - How to maintain employee morale
  - In summary, new ways of working --
CASEworks
Expanding Choices for Today’s Work Force
Changes...The world has changed

Everything has changed since 1826, when the State of Ohio granted the charter to establish Western Reserve College, in the small village of Hudson, Ohio.
Case has lead change in many ways...

In 1852, Nancy Elizabeth Talbot Clark was the first woman to graduate from Western Reserve's nine-year-old medical school. She was the second woman in the United States to receive a regular medical degree.

In the 2007-2008 Academic year, women represented 47% of the Case Western Reserve University student population and 33% of its faculty.
Case has lead change in technology...

- Opened in 1986, and originating at CWRU, the Free-Net was the nation's first free, open-access community computer system.

- In 1989, Case completed phase I of its fiber-optic computer network, CWRU net, to Residence Halls.

- In 1993, Case opened two new multimedia classrooms, giving Faculty networked access to films, videos, cable TV and other resources for course instruction.

- In 2003, Case installed its wireless network, which now spans 5.2 square miles in and around its campus.
The world of work has changed

Anyone, Anywhere, Anytime became reality with CASEworks

Broadband was still a vision

The Internet wasn’t even a cloud on the horizon

“email” was probably a typo

“9-to-5” was the norm
CASEworks is About Choice

CASEworks gives ITS employees greater choice in how to save and reinvest their time while enabling CASE to maximize the use of every resource
Choice is About Satisfaction

“Work is an activity, not a place...”

“CASEworks can give 500 hours and nearly $5,000.00 in commuting time and expenses back to my family each year and that’s important to me.

I already do a lot more productive work at home on personal time than in the office anyway, so I’m glad it’s finally being recognized. This program is a win for everyone!”

Your office or mine?
-Ron Ryan
Choice is About Satisfaction

“By eliminating the transaction costs of going to an office daily, I can free up valuable energy for productive work. It also allows me to balance family demands.

If I need to, I can walk to the school bus stop to pick up my kids without significantly affecting my work day. This makes me – and Case – more productive.”

“I never thought I could be in two places at one time. Thanks to CASEworks, I can.”

- Priya Junnar
ITS employees and their managers make choices about the CASEworks arrangements best suited for them, their teams and their departments.
How does CASEworks Work?

It's SIMPLE

Individual
Profile your needs

Group
Profile group/team needs

- Employee and manager follow a three-step process:
  - Determine employee profile
  - Identify appropriate CASEworks category.
  - Assess workspaces, tools, and privileges.
- Decisions made on the basis of individual, work group, and Case needs
Choose a CASEworks Category

<table>
<thead>
<tr>
<th>Categories</th>
<th>Profiles</th>
</tr>
</thead>
<tbody>
<tr>
<td>CASEspace</td>
<td>Technology Specialist</td>
</tr>
<tr>
<td>CASEflex</td>
<td>X</td>
</tr>
<tr>
<td>HOMEflex</td>
<td>X</td>
</tr>
<tr>
<td>HOME</td>
<td>X</td>
</tr>
</tbody>
</table>

Note: Each 'X' indicates the presence of a profile category for the respective product.
What are CASEworks work places?

It's SIMPLE...a network of places

**CASEspace** - Work in an assigned, dedicated space within a Case facility.

**CASEflex** - Work in multiple places within Case facilities.

**HOMEflex** - Work partly at home and partly at Case facilities.

**HOME** - Work mostly from their home office.
CASEworks is About Technology

It's SIMPLE

Case’s network provides a set of centralized resources that Case users can access on demand, from a Case office, home, the road, or anywhere.

The technology is available, dependable and scaleable.
Best Practices: Managing Across Multiple Locations

- Management training:
  - “Managing a dispersed work force”
  - “Change Management”
- Results-based performance management
- Manager role as facilitator, integrator, leader
- Management communication and support
- Leading by example

Vision, Direction, Goals
CASEworks Relies on Support

It's SIMPLE

- 24/7 help desk support
- Sustaining management teams
- Proactive suite of services
- New hire training
CASEworks: two years into the practice...

What worked best

Inclusion is Fundamental
- Our initial committee included all staffing levels
  - Technical and Administrative
  - Middle management
  - Senior Leadership
- Consulted with University Representatives
  - Human Resources
  - Case Faculty
  - Office of Counsel
  - Risk Management

Studied Best Practices
- Sun iWorks program
- AT&T
- Dow Chemical
- Worked our own pilot program
CASEworks: two years into the practice...
What worked best

Executive Sponsorship is Essential
- Consulted and gained approval from key University Administration
- CASEworks is now accepted practice throughout Case Western Reserve University

Training is Vital
- Conducted sessions for all staff, including Change Management
- Trained Managers how to manage in a dispersed workforce
- New managers tend to first resist the practice
- Training in the proper use of new technologies is ongoing
CASEworks: two years into the practice...
What worked best

Flexibility is Key

- Staff work with their managers to find best solution for each employee, workgroup and department, within University and Departmental Guidelines.

- Because of changing workflow, processes, demands, staff and management review and adjust CASEworks scheduling as part of normal process.
CASE's CASEworks Initiative

Our Vision is Information Technology
"Everywhere, All The Time, Any Way You Want It."

http://www.case.edu/its/caseworks

The CASEworks Committee
caseworks@case.edu
Work Anywhere Program
Stanford University
Presentation Overview

- Origin of Work Anywhere
- Work Anywhere Task Force Objectives
- Work Anywhere Program Requirements
- Work with Sun Microsystems & beyond
- Difficulties and Challenges
- Encouraging signs and successes
Origin of Work Anywhere at Stanford

- Acquired future campus site

  (Stanford now is a one main campus)

- Developed design goals for new campus

- Realized multiple campuses would require design of new work practices

- Also realized that multiple campuses would require new ways of supporting employee morale and loyalty, as employees will feel a loss of the special campus environment

- Formed Work Anywhere Taskforce to develop new work practices, policies, tools and support
Work Anywhere Task Force Objectives

Overall Goal:

Design a standardized approach and tools which allow a mobile workforce to work flexibly and efficiently between different work locations and schedules.
Work Anywhere Task Force Deliverables

- Design standard workplace options & work styles that fit
- Develop mobile work technology “Toolkits”
- Create a mobile technology support model
- Recommend information security policies and practice
- Update University policies to accommodate changes
- Develop management and employee best practices & training
Work Anywhere Program Requirements

- Senior Management commitment, leadership & support
- Managers’ and supervisors’ buy-in to telework concepts and practices (first within the pilots and then across campus)
- Cultural changes in workflow expectations
Work Anywhere Program

- First needed to understand Stanford employees work practices
  - How do they work today?
  - How might the patterns and practices change in a multi-campus flexible work environment?
- Engaged Sun and 8 Corners Consulting to help with a discovery process
Work with Sun Microsystems

- Using Sun’s Work Profile Assessment process, delivered survey and completed other assessments to learn:
  - What groups are more flexible to move off the main campus
    - How we work now
    - How we will work differently in new locations
    - How the above informs design and scope of new facilities
  - What Specific Questions were we trying to answer?
    - Work Patterns - % time in work locations, activities, interactions with workgroups & customers
    - Work Activities and Resources
    - Work Preferences & Characteristics
    - Mobility
  - Gain a better understanding of how to assure employees and departments success
What We Learned from Discovery Process

- How we work now:
  - 76% of time (30 hrs/wk) at desk or in work group area
  - 15% of time (6 hrs/wk) with partners/customers on campus mostly in smaller 3-6 person ad-hoc, informal meetings
  - 61% (24 hrs/wk) of time is spent on individual activities
  - 2-3 hours per week is spent working from home
  - Found departments need to be together at one location

- Stratified the Proportion of In-Person Interaction time by Department
  - Highest in-person time: Internal Audit, CFO, Public Safety, Land Buildings & Real Estate
  - Lowest in-person time: Controllers Office and Administrative Systems
Work with Sun Microsystems and Beyond

- Functional Specifications for Organizational Practices, Facilities and Technology required to support Stanford’s Mobile Work Practices
  - Key factors for a successful mobile work program
- Employee and Manager training on revised work practices & guidelines, tools, etc.
- Change Management Training (to move from a culture of seeing to a culture of believing)
  - This is our biggest challenge
- Pilot “Work Anywhere” concepts and employ early learnings
  - Upcoming Porter Drive move
  - School of Engineering’s work from home pilot
  - Other satellite campuses already exist (SoM, OOD)
Work with Sun Microsystems and Beyond

- Encourage policy development and work flow changes across campus
  - Keep talking about Work Anywhere
  - When a remote worker question arises, develop solutions
  - Get Work Anywhere projects and concepts into strategic plans
- For groups moving off campus & other pilots - categorize employees by work style & place (fixed, shared, mobile, fixed remote workspace)
- Develop Metrics framework to measure success
Difficulties and Challenges

- Stanford has a traditional style of working
- “Seeing is Believing” culture exists throughout the University
- Management & Employee training programs are not yet focused on performance management
  - This lack of people-management fundamentals is a serious challenge to a Work Anywhere program

We plan to address this via:
- Pilots for how Work Anywhere can succeed
- Development of a white paper to address management concerns
- Employees feel they are losing an implicit reward of working at Stanford by leaving the main campus
Difficulties and Challenges

- Ad hoc data sharing and retention with fixed access to work materials
- Stationary Technology (desktops vs laptops, land lines vs cell)
- Face to Face meeting culture
  - We need to:
    - Train employees to have effective virtual, on-line meetings
    - Provide easy access, technology enabled, conference rooms, and conference tools (voice and data)
- No dedicated program office - We are doing this on an “approved” volunteer basis
- All work accomplished is done through relationships and collective desire to improve and update our work practices
Successes – Encouraging Signs

- We have the technology!
  - We need to market and enable use more globally
  - Decentralized IT infrastructure makes cost effectiveness difficult
- Suitability for Alternative Work Arrangements exists
- Many pockets of best practice exist already
  - These include use of instant messaging, knowledge sharing databases, and deployment of data sharing collaboration tools eg WebEx
  - Several work groups within Business Affairs and LBRE that are already “leading the way”
- People are committed to moving this forward from the ground up
- Many of us know that we need these policies and practices in place to address our changing workforce. (This is a new driving force that will be more and more relevant over time.)
Discovery:
The First Step in Flexible Work Program Development

Lessons From Sun Microsystems

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Flexible Work at Sun

- All Sun employees participate in Open Work
  - Almost 20,000 employees do not have an allocated desk/office at a Sun facility
  - Reserving workspace in Sun offices and drop-in centers around the world; working from home; connecting with people and resources from anywhere; coming together in person when required.
  - Work anytime, anywhere, with three key requirements:
    - Delivery – Accessibility – Participation

- An objective process recommends the appropriate OW category:
  - “Flexible” Work anywhere (43% of employees)
  - “Home Assigned” Work primarily from home (11% of employees)
  - “Sun Assigned” Work primarily from Sun office (46% of employees)

- Ingrained as part of our corporate culture, policies
  Established policies and procedures for RE, IT, HR, employees, managers

- Support resources, tools, and services are available on-demand
  Work Space > Training and Education > Data and Files
  Telephony > Collaboration Tools > Information
  Applications > Access to Co-workers > Management Style
An Integrated Approach

INTEGRATED WORK SYSTEMS DESIGN
across the largest components of the organization's cost sheet
REAL ESTATE, HUMAN CAPITAL & INFORMATION TECHNOLOGY
Flexible Work Program Development
Sun's Approach To Developing A Robust, Scalable Program

- Discover
- Plan
- Design
- Implement
- Optimize
- Operate

<< Accelerate Change & Awareness >>

<< Project / Program Management >>

<< Open Work Product Development & Management >>
The First Step In Program Development

#1 Gather Data
- How your employees work today
- The resources they need to be effective at work
- Your organization's readiness to migrate to Flexible Work

Why?
- To assess if a Flexible Work opportunity exists
- To size the opportunity
- To help build the case for Flexible Work
- To identify potential pilot groups and early adopters
Key Data To Gather

- **Employee Residence Mapping**
  - The geographic distribution of employees' residences

- **Work Profile Assessment & Interactions Analysis**
  - How employees are working today, their needs/preferences, key adjacencies
  - Helps determine the Open Work category (flexible, assigned, home-based)

- **Workplace Utilization Study**
  - How the workspace is being used today

- **Infrastructure Assessments**
  - The infrastructure available to support employees in their work
  - Places, Technology, Management & HR Practices

- **Organizational Readiness Assessment**
  - The cultural and organizational factors which impact the successful adoption of Flexible Work
Work Profile Assessment

A subject process for determining the work arrangement that best supports our employees and the business, based on three factors:

**ABILITY**
Are the employees' work practices and requirements amenable to effective performance anywhere, anytime?

**SUPPORT**
Does the employee have the infrastructure, management and coworker support to participate to work flexibly?

**WILLINGNESS**
Does the employee have the motivation, preference, and work style that will enable them to be successful in a flexible arrangement?
Trends: Work Locations
Trends Across Organizations and Sectors

Stanford
- Elsewhere in Bldg: 6.6%
- Dept/Grp Area: 14.9%
- Other Company Bldg: 8.7%
- Mobile Working: 1.7%
- At Home: 5.9%
- Non-Company Places: 1.3%
- At Your Desk: 60.9%

Sun
- Elsewhere in Bldg: 2.9%
- Dept/Grp Area: 7.8%
- Other Company Bldg: 4.2%
- At Home: 23.8%
- At Your Desk: 50.4%
- Non-Company Places: 10.9%

Company "A"
- Elsewhere in Bldg: 4.9%
- Dept/Grp Area: 16.7%
- Other Company Bldg: 3.7%
- Mobile Working: 4.6%
- At Home: 9.8%
- Non-Company Places: 16.0%
- At Your Desk: 44.4%

Company "B"
- Elsewhere in Bldg: 5.5%
- Dept/Grp Area: 11.7%
- Other Company Bldg: 7.8%
- Mobile Working: 1.5%
- At Home: 7.6%
- Non-Company Places: 0.3%
- At Your Desk: 65.6%
Trends: Work Locations
Trends Across Organizations and Sectors

**Stanford**
- Formal Mtgs: 13.7%
- Teleph: 8.8%
- Email: 15.7%
- Video: 5.9%
- Informal Inter.: 10.5%
- Working Alone: 45.5%

**Sun**
- Formal Mtgs: 9.8%
- Video: 12.9%
- Email: 20.9%
- Video: 12.9%
- Informal Inter.: 6.8%
- Non-Sched. Teleph./Video: 10.6%
- Working Alone: 40.5%

**Company "A"**
- Email: 17.0%
- Teleph: 9.1%
- Video: 8.6%
- Informal Inter.: 7.8%
- Sched. Formal Mtgs: 9.8%
- Working Alone: 47.6%

**Company "B"**
- Email: 21.6%
- Sched. Formal Mtgs: 12.9%
- Informal Inter.: 5.8%
- Video: 11.4%
- Non-Sched. Teleph./Video: 31.2%
Lessons Learned

1. Make decisions based on data
2. Effective partnering with Real Estate, IT, & HR is a must
3. Start small with a focused pilot, and expand from there
4. The role of the manager is of heightened importance in a flexible work environment
5. Mandates can cause significant, long-term issues
6. Flexible work is not appropriate for all work profiles and/or individuals
7. Managers and employees require significant support as they adjust to new ways of working
8. Affiliation and social connections require attention
Exercise

Organizational Readiness Assessment
Organizational Readiness Assessment

An assessment of your organization's readiness for Flexible Work against criteria which are critical for program success.

Three Aspects Are Assessed:
- Organizational
- People-Related
- Work Process

Output:
As initial assessment of focus areas for your organization to consider in moving towards Flexible Work
Organizational Readiness Assessment

Goal: To evaluate your university/college's readiness for Flexible Work against success criteria for program success

Process:
- Consider your organization's "Today State" against each criterion, as the facilitator guides you through the exercise
- Enter your "Today State Score"
- When the exercise concludes, the average scores for the group overall will be displayed
- The "Desired State" scores will be revealed, and the explanation as to why each factor is considered important