



## 006 Telecommuting for Lawyers & Other Alternative Work Arrangements

**James R. Edwards**

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Wireless Facilities, Inc.

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*Second Vice President and Associate General Counsel*  
Acacia Life Insurance Company

**Janet B. Hunt**

*Vice President & Deputy General Counsel*  
Fannie Mae

**Jeanette Pfothauer**

*Vice President & Associate General Counsel*  
United States Chamber of Commerce

## Faculty Biographies

### James R. Edwards

James R. Edwards is senior vice president, general counsel, and secretary of Wireless Facilities, Inc. (WFI) in San Diego.

Prior to coming to WFI, Mr. Edwards most recently served as senior legal counsel for Qualcomm Incorporated working with Qualcomm's global development group and ventures group. Prior to joining Qualcomm, Mr. Edwards has served as vice president, general counsel, and secretary of Wireless Knowledge, Inc., a Qualcomm subsidiary; vice president, general counsel, and secretary of Vaportronics, Inc., a developer of medical device technologies; vice president, general counsel, and secretary of General Atomics, a energy and defense contractor focused on advanced technology research and development; and general counsel and secretary of Logicon, Inc., a defense contractor.

Mr. Edwards is a graduate of Colorado State University, where he received his B.S., cum laud , and of the University of San Diego, School of Law, where he received his J.D.

### Janet N. Gallo

Janet N. Gallo is second vice president and associate general counsel for Acacia Life Insurance Company ("Acacia") in Bethesda, Maryland, a member of the UNIFI Companies. Her responsibilities include providing counsel to Acacia and the UNIFI Companies in the areas of employment, benefit, merger and acquisition, contract, securities, and general corporate law. Ms. Gallo has been an attorney with Acacia for many years.

Prior to joining Acacia, Ms. Gallo practiced employment and securities law at the law firm of Schmeltzer, Aptaker, and Shepard, P.C. in Washington, D.C.

Ms. Gallo is a member of the Maryland Bar and the ABA, and has been successfully teleworking for the past eight years.

Ms. Gallo has a B.A. from James Madison University, M.A. of Laws in Labor and Employment degree from Georgetown University Law Center and a J.D. from the University of Baltimore School of Law.

### Janet B. Hunt

Vice President & Deputy General Counsel  
Fannie Mae

### Jeanette Pfothenauer

Jeanette Pfothenauer is vice president and associate general counsel of the Chamber of Commerce of the United States of America, a Washington, DC based business federation with an underlying membership of 3 million members. In this capacity she provides advice and counsel to the organization's business and policy managers, manages the Chamber's insurance portfolio and is responsible reviewing, preparing, and negotiating contracts and leases on behalf of the organization and its affiliates.

Prior to joining the Chamber, Ms. Pfothenauer served as general counsel of the Columbia Association, a public benefit corporation created to offer recreational, cultural, and community services to the residents of Columbia, Maryland. She began her career as a Seattle assistant city attorney representing the City's Board of Public Works and the city owned and operated utilities.

Ms. Pfothenauer served on the board of directors of the ACC's Washington Metropolitan Area Chapter, and held the office of secretary and treasurer. She has been a member of the Minnesota Association of Corporate Counsel since moving to Minnesota and currently serves on the career planning committee

Ms. Pfothenauer received a B.A. from Pacific Lutheran University and is a graduate of the University of Washington School Of Law.

**006 TELECOMMUTING FOR LAWYERS  
AND  
OTHER ALTERNATIVE WORK  
ARRANGEMENTS**

**James Edwards Sr.  
Sr. Vice President, General Counsel  
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**TELECOMMUTING FOR LAWYERS  
AND  
OTHER ALTERNATIVE WORK ARRANGEMENTS**

- I. Panelists/Program Overview- Jeanette Pfothenauer**
- A. Introduction of Panelists**
- B. Scope of Program**
- C. Do You Have A Flexible Work Schedule?**
- II. 24/7 - Jeanette Pfothenauer**
- A. The Digital Revolution**
- B. Working More?**
1. Lawyer Dissatisfaction
  2. Work Place Flexibility - Not Just A Woman's Issue
- C. Business Case for a Flexible Workplace**
1. Retention
  2. Recruitment & Diversity
  3. Loyalty - Productivity and Collegiality
  4. Corporate Image as an Employer of Choice
  5. Phased Retirement
- D. Flexible Work Arrangements**
1. Americans with Flexible Work Arrangements
    - a. 27 million have flexible schedules
    - b. 20 million work from home or a remote location at least once a week
    - c. 25 million part time workers
  2. Examples of Flexible Work Arrangements
    - a. Flextime
    - b. Reduced hours /part-time
    - c. Compressed work week
    - d. Telework/Telecommuting
    - e. Job Sharing
- III. Telecommuting/Telework – Janet Gallo**
- A. Telework Defined:**

Telework can generally be defined as the use of information and communications technologies to perform work away from the traditional worksite typically used by the organization.

Put another way, telework can be defined as the use of computers and telecommunications to change the accepted geography of work.

**B. Becoming a Teleworker**

**C. Making the Transition Appear Seamless**

**D. Perception of Arrangement by Peers and Clients**

**E. Pros and Cons of Teleworking:**

- Limited face to face interaction with co-workers (can create a feeling of disconnection, but can be overcome by effective management)
- Sometimes out of the loop on important information ("out of site, out of mind" - Again, this can be overcome by effective management.)
- Extra work needed to win over certain peers and clients (to overcome perception by some that you are not working or can not work effectively if you are not on-site – merger example)

b. For the Company

- Dealing with resistance to change
- Dealing with selection issues – making sure selections are fair (non-discriminatory) and appeasing employees who are not granted this type of arrangement
- Dealing with offsite data security needs

**F. Forces Instrumental in the Growth of Teleworking**

1. Change from Industrial to Information Age
2. Advances in technology
3. Increased pressure to balance work and family life (dual wage earners, single parents, etc.) and reduce stress
4. Competitive Pressures: need to reduce operating costs (real estate, etc.) and improve ability to recruit and retain workers
5. Social and economic pressure to reduce traffic congestion and conserve fuel and other natural resources

**IV. Job Sharing –Janet Hunt**

**A. Fannie Mae's Flexible Work Options**

1. Flexible Work Options
2. Statistics for Fannie Mae's Flexible Work Option Participants

**B. My Job Sharing Arrangement**

1. Schedule
2. Responsibilities
3. Allocation of Benefits/Compensation
4. Job Share Agreement
5. Performance Evaluation
6. Career Development
7. Manager & Team Support

**C. Becoming Job Sharer**

1. How I became a Job Sharer
2. Effective Job Share Proposal
3. Finding the Right Partner

**D. Benefits and Challenges of Job Sharing**

1. Employee

- a. Benefits
  - b. Challenges
2. Employer
    - a. Benefits
    - b. Challenges

**E. Elements of a Successful Job Share**

1. Right Partner
2. Communication
3. Coverage & Scheduling
4. Supportive Manager
5. Flexibility

**V. Supervising the Flexible Work Place-Jim Edwards**

**A. Decision to Institute a Program**

1. Evaluate Corporate Culture
  - Flexibility vs. Strict Rules
  - History of employee issues?
2. Perception of Favoritism
  - Program only for favored departments?
  - Resentment by others?
3. Geographic Issues
  - Solo Employees in remote locations?
4. Special Circumstances
  - Pregnancy
  - Child/parent care
  - Injury recovery
  - Temporary assignments

**B. Types of Programs**

1. Variable by Business Unit
  - May depend on types of businesses
  - Types of Employees
  - Areas of the country
2. One Size Fits All
3. Consider All the Downsides
  - Management buy-in is critical
  - Corporate and Operations
4. Review Local Laws

**C. Supervision & Operation**

1. Extra Effort is Required to Maintain Integration of Employees
  - Out of Sight/ Out of Mind
2. Comments and Complaints for Other Managers and Non-Participants
3. Anticipate Abuse by Some Employees
4. Personal Experience is Positive with Professional Employees
5. Retention and Recruiting Tool
6. Develop Solid and Objective Metrics

**D. Rollback**

1. What if The Program Doesn't Work?
  - Anticipate a rollback plan.
  - Some employees may ruin it for all.
2. Applies to Individuals and the Entire Program
3. Implement the Program as a Temporary or Trial Effort.
4. Review Regularly
5. Anticipate Problems with Terminating Employees in an Alternative Work Arrangement
  - Problems with remote employees
  - Return of assets

**E. Summary**

1. Some Employees Will Thrive and Appreciate the Flexibility
  - Work harder
  - Loyalty
2. Some Will Abuse the Program
  - Less likely with professionals but...
3. Alternative Work Arrangements are Worth Exploring

**PUBLICATIONS**

1. A Survival Guide for Road Warriors: Essentials for the Mobile Lawyer by Daniel Coolidge and J. Michael Jimmerson.
2. Alternative Work Arrangements –Overcoming Challenges by Alea Jasmin Mitchell. November /December issue Diversity and the Bar.
3. Balanced Lives, Changing the Culture of Legal Practice. Prepared for The American Bar Association Commission on Women in the Legal Profession by Deborah L. Rhode.
4. Better on Balance Report – The Corporate Counsel Work/Life Report of the Project for Attorney Retention.
5. Breaking Traditions: Work Alternatives for Lawyers edited by Donna Killoughey.
6. Catalyst Publications:
  - A New Approach to Flexibility: Managing the Work/Time Equation
  - Beyond a Reasonable Doubt: Building the Business Case for Flexibility
  - Beyond a Reasonable Doubt: Creating Opportunities for Better Balance
  - Flexible Work Arrangements III: A Ten-Year Retrospective
  - Making Change: Building a Flexible Workplace
  - Making Work Flexible: Policy to Practice

<http://www.catalyst.org/knowledge/topics.shtml#wor>
7. In Pursuit of Attorney Work-Life Balance: Best Practices in Management. by Susan Saab Fortney. National Association for Law Placement Bulletin April 2006
8. Innovative Workplace Strategies, U.S. General Services Administration GSA Office of Government Wide Policy Office of Real Property December 2003
9. Making The Leap: train supervisors to overcome their hesitance to manage teleworkers by Jennifer Taylor Arnold, 80 HR Magazine May 2006
10. Office of Personnel Management Publications
  - Handbook on Alternative work Schedules [www.opm.gov/oca/aws/](http://www.opm.gov/oca/aws/)
  - Managing in a Flexible Work Environment: Performance Management [http://www.opm.gov/Employment\\_and\\_Benefits/WorkLife/WorkplaceFlexibilities/Perform/](http://www.opm.gov/Employment_and_Benefits/WorkLife/WorkplaceFlexibilities/Perform/)
  - Part-Time Employment and Job Sharing Guide [http://www.opm.gov/Employment\\_and\\_Benefits/WorkLife/OfficialDocuments/handbooksguides/PT\\_Employ\\_JobSharing/index.asp](http://www.opm.gov/Employment_and_Benefits/WorkLife/OfficialDocuments/handbooksguides/PT_Employ_JobSharing/index.asp).
  - Telework: A Management Priority A Guide for Managers, Supervisors, and Telework Coordinators. [http://www.telework.gov/documents/tw\\_man03/tw\\_man.asp](http://www.telework.gov/documents/tw_man03/tw_man.asp)

**FLEXIBLE WORK AGREEMENT  
(To be completed annually)**



11. Sun Microsystems' New Work Ethic by Phillip Zweig Outlook -2110, Number1.
12. Telecommuting for Lawyers by Nicole Belson Goluboff
13. Telecommuting Success A Practical Guide for Staying in the Loop while Working Away from the Office by Michael J. Dziak and Gil Gordon
14. The Law of Telecommuting by Nicole Belson Goluboff
15. The Work/Life Challenge: Not Just a Woman's Issue Part I and Part II by Kathleen Dreessen. July/August & September/October issue of Diversity and the Bar
16. The World Is Flat: A Brief History of the Twenty-First Century by Thomas Friedman
17. WHEN WORK WORKS Prepared and Published with Funding from IBM
  - A Status Report on Workplace Flexibility: Who has it? Who wants it? What difference does it make? by Ellen Galinsky, James T. Bond, and E. Jeffrey Hill
  - Overwork in America- When the Way We Work Becomes too Much , Family and Work Life Institute by Ellen Galinski, James T. Bomd, Stacy S. Kim, Loch Berchon, Erin Brownfield, Kelly Sake
  - Summary of Families and Work Institute Research Findings By James T. Bond, Ellen Galinsky, and E. Jeffrey Hill
  - Flexibility: A Critical Ingredient In Creating An Effective Workplace By James T. Bond, Ellen Galinsky, and E. Jeffrey Hill
18. Work to-to-Life Balance in Departments and Firms A Balancing Act by Alea Jasmin Mitchell. September/October 2003 issue of Diversity and the Bar.
19. Balancing Work and Life in Job-Sharing Positions; Flexible Scheduling Boosts Productivity by Katherine Reynolds Lewis, Newhouse News Service, The Chicago Tribune (January 1, 2006)

**WEBSITES**

1. [www.familiesandwork.org](http://www.familiesandwork.org)
2. [www.catalystwomen.org](http://www.catalystwomen.org)
3. [www.pardc.org/](http://www.pardc.org/)
4. [www.nalp.org](http://www.nalp.org)
5. [www.abanet.org/women/](http://www.abanet.org/women/)
6. [www.opm.gov](http://www.opm.gov)
7. [www.dpa.ca.gov/telework/teleworkmain.shtm](http://www.dpa.ca.gov/telework/teleworkmain.shtm)
8. [www.energy.state.or.us/telework/telehm.htm](http://www.energy.state.or.us/telework/telehm.htm)
9. [www.itac.org](http://www.itac.org)
10. [www.dol.gov/dol/asp/public/telework/toc.htm](http://www.dol.gov/dol/asp/public/telework/toc.htm)
11. [www.shrm.org](http://www.shrm.org)

Name: \_\_\_\_\_ Manager: \_\_\_\_\_

Job Title: \_\_\_\_\_ Manager Title: \_\_\_\_\_

Employee ID: \_\_\_\_\_ Phone: \_\_\_\_\_

Department: \_\_\_\_\_ HR Business Partner: \_\_\_\_\_

Exempt: \_\_\_\_\_ Non-Exempt \_\_\_\_\_ Date of Request: \_\_\_\_\_

Effective Date of Agreement: \_\_\_\_\_ Cost Center: \_\_\_\_\_

**Part I. Agreement Description**

**A. Select one or all flexible work option(s) requested (see the glossary on page 8 for definitions of the options):**

\_\_\_\_\_ Compressed Schedule (Complete Sections C & D) \_\_\_\_\_ Local Telework (Complete Sections C & D)<sup>1</sup>

\_\_\_\_\_ Flexible Hours (Complete Section B) \_\_\_\_\_ Remote Telework (Complete all sections)<sup>2</sup>

\_\_\_\_\_ Part-time Schedule (Complete Section C & D) \_\_\_\_\_ Job Share (Complete Section C)<sup>3</sup>

**B. Flexible Hours**

Do you work hours other than 8:30 a.m.-5:00 p.m.?  Yes  No. If yes, skip to Signature section of this agreement.

**C. If you are a Teleworker or a Compressed Worker complete the schedule below.**

Week 1	Hours	Total Daily Hours	On-Site (City, State)	Off-Site (City, State)
Sunday	_____	_____	_____	_____
Monday	_____	_____	_____	_____
Tuesday	_____	_____	_____	_____
Wednesday	_____	_____	_____	_____
Thursday	_____	_____	_____	_____
Friday	_____	_____	_____	_____
Saturday	_____	_____	_____	_____
Total Weekly Hours: _____				

<sup>1</sup> This option is for employees who telework in the same metropolitan location as their assigned business unit.  
<sup>2</sup> This option is for employees who telework outside of the same metropolitan location as their assigned business unit. For example, if an employee is assigned to a business unit in DC and teleworks from Philadelphia, s/he is a remote teleworker.  
<sup>3</sup> Employees must find a partner; the job share partner must prepare and submit a separate FWO Agreement.

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**Week 2**

	Hours	Total Daily Hours	On-Site (City, State)	Off-Site (City,State)
Sunday	_____	_____	_____	_____
Monday	_____	_____	_____	_____
Tuesday	_____	_____	_____	_____
Wednesday	_____	_____	_____	_____
Thursday	_____	_____	_____	_____
Friday	_____	_____	_____	_____
Saturday	_____	_____	_____	_____
Total Weekly Hours: _____		Two Week Total _____		

**D. Agreement Details**

**1. Describe any benefits/potential problems the new arrangement could raise with your business partners, and explain how they will be handled:**

\_\_\_\_\_

\_\_\_\_\_

**2. Describe the measurables and review processes (e.g. , project goals, status reports, bi-weekly update meetings) you and your manager should use to constructively monitor the agreement.**

\_\_\_\_\_

\_\_\_\_\_

**E. Telework**

The following chart reflects which type of expenses are/are not reimbursable while teleworking. To further assist the manager and employee with determining which expenses are reimbursable, a Remote Telework Questionnaire is attached for both the manager and employee's completion and submission with this agreement. **Note: The examples referred to in the chart correspond to the questions in the questionnaire, which can be found in section VII of this document.**

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**Reimbursable Expense Chart Examples**

Categories	Fannie Mae Initiated		Employee Initiated	
	Employee has no regular FM office, works from home and spends time at work locations of clients, lenders, etc.	Fannie Mae asks an employee to take a job away from home and employee chooses not to move.	Employee with unique skills requests to work at another FM location or from home, but "job" remains in first FM office.	Employee requests to work at another FM location or from home, but "job" remains in first FM office.
<b>Example of Questionnaire Response</b>	<b>1(c), 2(a) and (b) yes</b>	<b>1(a), 3 yes</b>	<b>1(b), 4(a) and (b) yes</b>	<b>1(b), 4(a) yes, 4(b) no</b>
<b>Reimburse Travel*</b>				
Travel to Fannie Mae office	Yes	Yes	Yes	No
Other Travel for Fannie Mae	Yes	Yes	Yes	Yes
<b>Provide Office Technology/ Reimburse Services</b>				
Desktop/Laptop Computer	Yes	Yes	Yes	Yes
Fax Machine	Yes	Yes	No	No
Printer	Yes	No	No	No
Copying expenses etc	Yes	Yes	Yes	Yes
<b>Reimburse Communications Services</b>				
(Installation/initiation costs of service)	Yes	Yes	No	No
Primary Telephone Line Monthly Service	Yes	Yes	No	No
Telephone Line Special Features (Voicemail, Call Forward, Caller ID, Call Waiting, Speed Dial, Distinct Ring <sup>1</sup> , Others)	Yes	Yes	No	No
Business Related Calls	Yes	Yes	Yes	Yes
Data Line Connection (ISDN, Cable, DSL, Analog)	Yes	Yes	No	No
<b>Salaries</b>				
Reimbursements Added to Wages	No	Yes	Yes	N/A
Tax gross-up (no FICA)	No	Yes	Limited	N/A
Tax gross-up limitations	N/A	Determined by business need	1 year	N/A

**For additional information regarding technology use, please see the Managing Technology Fact Sheet, Remote Access, Broadband Definitions, and Communications Connectivity Chart. All located under LifeStage Benefits/Telework.**

\* Travel includes transportation, lodging, meals and incidentals.

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## Part II. Agreement for Remote Teleworking (RT)

This section should be read and completed only by employees who regularly telework outside of the metropolitan location of their assigned business unit.

Employee and manager agree that this RT agreement is for the convenience of **(Check one box only)**:

Employee       Fannie Mae

**Note:** The arrangement is for the convenience of the employee if working from a remote location is primarily for the employee's personal convenience. Generally, all RT agreements are for the convenience of the employee, unless the manager establishes that working from a remote location is for the convenience of Fannie Mae. The arrangement is for the convenience of Fannie Mae if having the employee work from a remote location is necessary for carrying on Fannie Mae business. **On a separate sheet, the manager must explain how the arrangement is for the convenience of Fannie Mae.**

If the RT agreement is for the convenience of the employee, then expenses incurred by the employee for travel between the employee's home and principal Fannie Mae work location(s) (including any meals and overnight lodging) generally will not be reimbursed. Transportation costs between the employee's home and principal work locations are commuting expenses and are the responsibility of the employee. Travel costs to temporary Fannie Mae work locations (regardless of distance) for meetings, training or other specified business purpose will be reimbursed and will not be included in the employee's wages.

If, at the manager's option, the employee is reimbursed for any expenses incurred for travel between the employee's home and principal Fannie Mae work location(s) (including any meals and overnight lodging), then the reimbursement must be classified as wages to the employee, subject to income and employment tax withholding. Other business travel and RT expenses that are required in the employee's performance of his/her job will be reimbursed and will not be included in the employee's wages.

Remote Teleworking may cause an employee to recognize additional income or incur expenses for which a tax deduction may be available. You may wish to become familiar with tax laws that may apply to your working at home.

### Travel and Related RT Expenses: If for Convenience of Fannie Mae

If the RT site listed in Part I is the employee's home, the arrangement must satisfy the following IRS criteria:

1. The employee works from home for the convenience of the employer
2. A portion of the employee's home is used regularly and exclusively for business, and
3. The employee's home is his/her principal place of business (meaning there is no other fixed location where the employee conducts substantial administrative and management activities).

If the RT agreement is for the convenience of Fannie Mae, as defined above, then expenses incurred by the employee for travel between the employee's home and other Fannie Mae work locations (including any meals and overnight lodging) are considered business expenses. These expenses and other business travel and RT expenses that are required in the

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employee's performance of his/her job will be reimbursed and will not be included in the employee's wages. **(Note: See Managing Technology for Teleworkers Fact Sheet and the Reimbursable Expense Chart)**

### Voluntary Participation

Employee voluntarily agrees to work at the RT site listed in Part I and understands all applicable Fannie Mae policies and procedures. Employee understands that this RT agreement is not an employee benefit or entitlement. It is an alternative work agreement that is approved as part of the Fannie Mae Work Life Program. Employee understands and agrees that this RT agreement does not create a contract for employment and that the employee is an "at-will" employee.

### Term of Agreement

The first six months of the RT agreement will be considered a trial period during which the agreement may be terminated only upon 30 days' written notice from one party to the other, unless performance issues or business needs warrant earlier termination by the manager. After the trial period, this agreement will continue on a month-to-month basis and may be terminated at any time by either employee or manager, for any or no reason. Human Resources will conduct an annual review of this agreement to determine if business needs, performance issues, or changes in the employee's responsibilities require any revision to the agreement.

### Change of Remote Teleworking Site

At any time during the term of this agreement, the manager may change the location of the RT site, upon 15 days' written notice to the employee. If the employee does not accept the changed location, this agreement will terminate automatically on expiration of the notice period.

### Expense Report

An employee submitting an Expense Report for reimbursable business travel and RT expenses must use the "Purpose of Trip or Expenditure" field to flag and explain that the expenses are related to RT agreement.

## Part III. General Provisions

### Salary and Benefits

Employee understands that this agreement has no bearing on the employee's salary or benefits. Employee understands that his/her compensation and benefits as a Fannie Mae employee are not affected by whether the agreement is in effect.

### Time and Attendance

Employee agrees to submit timesheets according to Fannie Mae policy.

### Leave

Employee agrees to follow established office procedures for requesting and obtaining approval for leave. All leave will be governed by Fannie Mae's leave policies.

### Work Assignments/Performance Management

Employee agrees to complete all assigned work according to procedures mutually agreed upon by the employee and manager and according to guidelines and standards in the employee's performance plan. Employee understands that unsatisfactory performance may be grounds for canceling this agreement and/or initiating disciplinary action. Employee remains subject to all applicable Fannie Mae policies covering performance management, disciplinary action, and termination of employment.

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**Return of Fannie Mae's Property**

Employee agrees to return any and all Fannie Mae property within ten (10) days after termination of this agreement or employee's Fannie Mae employment.

\* EVP Signature: \_\_\_\_\_ Review Date \_\_\_\_\_

**Reporting Work-Related Injuries**

Employee agrees to report all work-related incidents/injuries to the Health Services Unit as soon as possible and in the same manner as if the injury had occurred on Fannie Mae's premises.

FWO Program Manager (Human Resources)

Signature: \_\_\_\_\_ Review Date \_\_\_\_\_

**Other Action**

Nothing in this agreement precludes the manager from taking any appropriate disciplinary or adverse action against the employee if s/he fails to comply with the provisions of this agreement or any Fannie Mae policy. Employee continues to be subject to Fannie Mae's policies, procedures, and practices contained in the Policies & Procedures site on the company's Intranet, the Code of Business Conduct, and any applicable company or departmental guidelines.

\*Only for Remote Teleworkers.

**Part IV. Employee Acceptance of Flexible Work Agreement**

I understand that this Flexible Work Agreement does not constitute a contract of employment and should not be construed as such. I understand that my employment with Fannie Mae is considered "at will"—I am free to terminate my employment with the company at any time and the company can terminate my employment as well with or without cause. Subject to the notice requirements contained in this agreement, I understand that Fannie Mae or I can terminate this Flexible Work Agreement at any time with or without cause. I further understand that I must notify the Human Resources FWO Program manager if I change business units or wish to terminate the agreement. I fully understand my responsibilities and agree to comply with the conditions outlined in this agreement.

Employee Signature: \_\_\_\_\_ Date: \_\_\_\_\_

**Part V. Manager Acceptance of Flexible Work Agreement**

This proposal for a Flexible Work Arrangement  is or  is not approved.  
(check one)

If the proposed agreement is not approved, please describe the business rationale below:

\_\_\_\_\_

Effective date of the Flexible Work Agreement \_\_\_\_\_ Review Date \_\_\_\_\_

Ending date of Flexible Work Agreement, if applicable: \_\_\_\_\_

Manager Signature: \_\_\_\_\_ Review Date \_\_\_\_\_

VP Signature: \_\_\_\_\_ Review Date \_\_\_\_\_

HR Business Partner: Signature: \_\_\_\_\_ Review Date \_\_\_\_\_

**Please return the completed FWO agreement and supporting documents to FWO Program Manager, Yvonne Miller at mail stop 1H-2W-04A. If you have questions, call 202-752-6173.**

**Part VI. Glossary of Flexible Work Option Terms**

Agreement:	is a document that is used to outline the Flexible Work Options being utilized by the employee. The agreement must be signed by both the employee and manager <i>and, if the Agreement includes a Remote Telework option, the officer to whom the employee and manager report.</i>
Compressed Schedule:	allows fewer working days during each pay period – by extending each day spent on the job beyond the normal schedule.
Flexible Hours:	allows you to choose a specified, set time that each workday begins and ends. The work week remains five days, and the pay period remains 75 hours for two weeks.
Flexible Work Options (FWO)	components of non-traditional benefits that enable employees and managers to work together to creatively address both business and individual needs. The components are: flexible hours, compressed schedule, local teleworker, remote teleworker, part-time schedule, and job share).
Job Share:	is a work situation in which two similarly skilled workers split the responsibilities of one job function; in effect, each becomes a part-time employee.
Local Teleworker:	employee who works <b>within</b> the same metropolitan <i>area</i> as his/her assigned business unit. This option enables you to work out of your home, in an alternative office space near your home, or through a mobile office setting, for part of your regular work schedule.
Part-time Schedule:	allows you to work fewer hours than the standard full-time schedule (37.5 hours).
Remote Teleworker:	employee who regularly works <b>outside</b> the same metropolitan area of his/her assigned business unit, and whose telework arrangement is documented on a telework agreement approved by his/her manager and appropriate program controls, which may include review by Legal, HR Business Partner and Human Resources FWO Program manager.

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**Part VII: Remote Teleworker Questionnaires**

**FANNIE MAE  
REMOTE TELEWORKER QUESTIONNAIRE**

Employee Name: \_\_\_\_\_  
 Employee Number: \_\_\_\_\_  
 Manager: \_\_\_\_\_

Please check the appropriate line or supply the requested information in the questions below.

**To be completed by Employee**

1. Are you a remote teleworker because:
  - \_\_\_\_\_ (a) You spend 60% or more of your work hours (approximately 3 days) at a Fannie Mae office that is not within commuting distance of your home. (For example, you live in Chicago, but work 4 days a week at Fannie Mae's office in Washington, DC.)  
 Which Fannie Mae office? \_\_\_\_\_
  - \_\_\_\_\_ (b) You work from your home and the Fannie Mae office where you would work if you did not work from home is outside of commuting distance of your home. (For example, you work 4 days each week from your home in Philadelphia and one day in Fannie Mae's Washington, DC office. If you did not work from home, you would be assigned to the DC office.)  
 What Fannie Mae office would you be assigned to? \_\_\_\_\_
  - \_\_\_\_\_ (c) You spend a significant portion of your time in the field visiting your clients and/or lenders and the remaining time working from home.
  - \_\_\_\_\_ (d) You divide your time between two Fannie Mae locations: one is within commuting distance of your home and the other is outside of commuting distance of your home and may be where your manager is located. (For example, you work in Philadelphia within commuting distance of your home and occasionally travel to DC for meetings with your manager or for other business reasons.)
2. If you checked (b) or (c) in question 1,
  - Is a room or portion of your home used regularly and exclusively for Fannie Mae business? \_\_\_\_\_ yes \_\_\_\_\_ no
  - Is your home the principal place of business as a Fannie Mae employee (meaning there is no other fixed location where substantial administrative and management activities are conducted)? \_\_\_\_\_ yes \_\_\_\_\_ no

\_\_\_\_\_  
Employee's signature

Please return completed questionnaire to your manager.

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**FANNIE MAE  
REMOTE TELEWORKER QUESTIONNAIRE**

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

Employee Number: \_\_\_\_\_

Manager: \_\_\_\_\_

Please check the appropriate line or supply the requested information in the questions below.

**To be completed by Manager**

- 3. Did Fannie Mae initiate the employee's remote telework arrangement? In other words, did Fannie Mae ask the employee to take a job outside of his/her current commuting area and the employee decided not to relocate his/her home?  
 yes  no

If the answer is no, please go to question 4. If the answer is yes, go to questions 5 and 6.

- 4. (a) Did the employee initiate the remote telework arrangement so that he/she could relocate outside of the commuting area of his/her assigned Fannie Mae office?  
 yes  no

(b) Does the employee have unique skills valuable to Fannie Mae's business that cannot be replaced in the short term? To ensure that the employee has a unique combination of skills valuable to Fannie Mae, please consult your HR Business Partner for assistance with this question.  
 yes  no

If yes, please explain.

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

\_\_\_\_\_  
HR Business Partner Signature

- 5. Will there be potential savings as a result of the remote telework arrangement?  
 yes  no

If yes, please explain.

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

- 6. Has the remote telework arrangement been approved by the Executive Vice-President of your division?  yes  no

\_\_\_\_\_  
Manager's signature

Please return the completed questionnaire, including the portion completed by the employee along with the approved FWO agreement to Yvonne Miller at mail stop 1H-2W-04A.

## Flexible Work Option Check List

1. Employee has met with his/her manager to discuss the proposed arrangement.
2. Employee has completed all required sections of the agreement.
3. Employee has signed and dated page 6 of the agreement.
4. Manager has approved or declined the proposed arrangement and signed on page 6 of the agreement.
5. Employee has obtained a signature from his/her manager if he/she has a Flexible Schedule, Compressed Schedule, Part-Time Schedule, Job Share, Local Telework Schedule or a Remote Telework Schedule **"for the employee's convenience."**
6. Employee has obtained the signatures of his/her assigned HR Business Partner.
7. Employee has obtained signatures from his/her manager, VP, and EVP if he/she has a Remote Telework arrangement **"for the convenience of Fannie Mae."**
8. Employee has completed and signed the Remote Telework Questionnaire on page 9 **(only if requesting a Remote Telework arrangement).**
9. Employee has ensured that his/her manager has completed and signed the Remote Telework Questionnaire on page 10 and 11 in addition to obtaining his/her HR Business Partner signature on page 10 **(only if requesting a Remote Telework arrangement).**
10. FWO program manager will send all Remote Telework Agreements to Legal for review and to ensure that the arrangements are in compliance with IRS guidelines.
11. Employee kept a copy of the signed agreement for his/her files and forwarded the original to the FWO program manager for review and processing.
12. Employee understands that this arrangement must be renewed annually and that the current arrangement can be discontinued at anytime by the manager or the employee.

**Compressed Schedules Flexible Work Option****Introduction**

A compressed work schedule allows fewer working days during each pay period -- by extending each day spent on the job beyond the normal schedule.

**Example**

If you accomplish the work of a two-week pay period (ten working days) in nine working days, you would create one "flex day."

**Expectations**

- Employees must establish standard schedules during which they will be expected to be on the job.
- The work schedule should encompass the core hours of the work unit.
- Non-exempt employees must meet the 75-hour requirement per pay period, and cannot schedule more than 40 hours in a single week.
- Employees must manage their work responsibilities to meet departmental goals.

**Advantages**

- You spend fewer days in the office.
- You have no reduction in compensation and benefits.

**Considerations**

- Employees may need to adjust their compressed schedule occasionally to ensure coverage during critical production periods, to attend meetings, and to participate in training.
- The same amount of work normally accomplished during a regular business schedule must be fully accomplished during the days you do work.
- No matter what the schedule, if you work a compressed work week you must continue to fulfill your work obligations -- i.e., goals and deliverables -- and meet business needs according to quality standards.

**Role of Managers**

Managers play a critical role in the success of flexible work arrangements. These general guidelines should help you manage any of the flexible work options available to employees.

**Manage for Results**

- Remember that meeting business goals is our top priority.
- Develop shared measurable performance goals (results and critical success factors) to manage flexible work options successfully.

**Be Flexible**

- Flexible work arrangements often require adjustments in their beginning stages.

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- Be receptive to employee, customer, and co-worker suggestions for improving the arrangement.
- Expect to do some adjusting at the outset and as often as necessary. Discuss these adjustments with the employee as needed.

#### Communicate

- Flexible work arrangements can impact existing communication patterns within a team or work group. Discuss the potential impact with the group, and establish guidelines for continuous effective communication.
- Decide on the most effective media, i.e., phone, voice mail, email, shared drives, etc., to ensure ongoing information sharing.
- Coach employees in the development of a relationship management strategy.

#### Cover Core Hours

- Determine if there are divisional or departmental minimum core hours when all employees must be available.
- Communicate the core hours and recognize them as critical to the success of flexible schedules.
- Be sure that flexible scheduling and core hours work in concert to ensure satisfactory flexibility for the employee and sufficient shared work time for the work group and customers.

#### Publish and Use a Schedule

- All employees should update a group schedule on an ongoing basis, noting whether coverage is onsite or offsite.
- Consider the schedule when planning meetings. Establish team guidelines for attendance -- i.e., whether physical presence is mandatory or phone attendance is optional.
- Let customers know the flexible schedules when appropriate.

#### Get Feedback from Teammates and Customers

- Realize that teammates and customers often perceive that they are affected by a flexible work arrangement. Effective communication can address this perception.
- Continuously solicit feedback from everyone involved to ensure ongoing positive and productive relationships.
- Be prepared to act on that feedback and make adjustments accordingly.

#### Give Feedback

- Particularly in the early stages of the arrangement, an employee will need feedback on communication, performance, and any other aspects of the job or the work relationships.
- When giving feedback, be clear about any issues that arise because of the flexible arrangement.
- Provide the employee with behavioral examples that are actionable and specific.

#### Be Prepared to End It

- In the event that performance and/or business needs have been negatively impacted, it may become necessary to terminate the flexible work arrangement. Remember that a flexible work arrangement is not a benefit, accommodation, or entitlement.

#### Role of Employees

Employees with the following characteristics tend to be most successful at flexible scheduling -- in terms of enhancing their work, supporting customers and co-workers, and sustaining the business:

#### Have Strong Self-Management Skills and Be Highly Self-Motivated

- Good candidates for flexible arrangements have good time management skills and the ability to set clear priorities.
- An employee with a flexible arrangement will sometimes work when a manager or co-workers are not in the office; for example, you may work hours before and/or after your coworkers in order to complete your longer days. These conditions require that an employee has the competence and confidence to make sound business decisions without the input of others.
- Employees on flexible schedules need to be able to function sometimes with limited or no supervision. Key requirements are trustworthiness and ability to self-direct.

#### Be Flexible

- Flexible work schedules will not work if the schedule is treated rigidly. Allow reasonable amounts of variation, a degree of accommodation and lots of communication with everyone involved.

#### Avoid Invisibility

- Some employees perceive that flexible arrangements come at the expense of career advancement. To minimize this perception, plan a relationship management strategy and act systematically to make yourself and your contributions visible.
- Action steps should include consciously making connections with others when in the office, highlighting contributions to the team in meetings, and volunteering for high-impact but manageable committees or task forces.

#### Time Sheet Reporting for a Compressed Schedule

Fannie Mae uses "exception time" reporting for all non-management employees. Exempt employees must submit timesheet reports to record all leave taken during a pay period; non-exempt employees must also submit a timesheet if they have overtime to report. Employees on a compressed work schedule must report vacation and/or sick leave based on the number of scheduled hours associated with their compressed work schedule. For example, if you are on a 9/1-compressed schedule, you may plan to work 8.5 hours on each of the nine days you are in the office; if you take leave on one of those nine days, you must record 8.5 hours of leave used for that day. If you are a shift worker, scheduled for three 12-hour days a week, you must record 12 hours of leave when you take leave on a regularly scheduled workday. The Flexible Work Agreement lets you specify how many hours you will work on each day, and therefore, how many hours of leave you would record for each day.

#### Reporting Vacation Leave and Sick Leave

##### Vacation Leave

- Vacation leave is allotted on an annual basis as an advance of the total vacation leave entitlement that employees will earn by working throughout the year.
- Employees must report the number of hours associated with their compressed FWO schedule when recording leave on their time sheet.
- For example, an exempt employee who is on a nine-day schedule and expected to work 8.5 hours each day will report 8.5 hours of leave for each vacation day taken.

##### Sick Leave

- Sick leave is calculated and may be used in half-hour increments.

- Employees on a compressed schedule who are out sick for an entire day will need to record the number of hours that they were scheduled to work that day as sick leave.
- For example, an employee who is on a 4/1 compressed schedule and expected to work 9.5 hours each day must record 9.5 hours of sick leave for each day they are out.

#### Holidays

- Fannie Mae provides paid time off to employees whose normal workday falls on the day that the company observes the holiday.
- An employee may be required to report to work if business/workload so requires.
- Exempt employees do not receive additional compensation for working on a holiday.
- Employees who are not normally scheduled to work on the day that the company-wide holiday is observed are not entitled to an additional day off.

#### Frequently Asked Questions

##### 1. What happens if I have to work on my scheduled non-work day?

Managers retain the right to adjust schedules during critical production periods or if business/workload so requires. Therefore, there may be times when you will be required to work on your scheduled non-workday. Failure to report to work when required or maintain a satisfactory level of production may result in disciplinary action.

##### 2. What happens to my FWO schedule during peak production periods?

If a critical production period is coming up and/or a number of people will be out on vacation, employees may be required to reschedule a non-work day to another day (in the same pay period) that doesn't cause undue hardship on the work unit in meeting its business obligations. However, if the day cannot be rescheduled during that same pay period, the day off will be lost. Keep in mind that the work employees perform should allow them to use non-work days on a regular basis. If employees are frequently unable to use their non-work day, open dialog on the problem with team members and the manager should uncover causes and alternatives; but it is possible their position is not well suited to a compressed work schedule.

##### 3. What happens if my scheduled day off is a holiday?

Employees not scheduled to work on the day the company holiday is observed are not entitled to an additional day off. Fannie Mae provides paid time off to employees whose normal workday falls on the day the company observes the holiday. An employee may be required to report to work if business/workload so requires. In such cases, non-exempt employees will be paid for the holiday and will be paid for hours worked at 1-1/2 times their regular hourly rate.

##### 4. What happens when a non-exempt employee on a compressed schedule works overtime?

Overtime compensation for non-exempt employees working a compressed work schedule is governed by the Federal Laws, therefore overtime compensation will be paid for all hours worked in excess of 40 hours in a workweek. A non-exempt employee may not schedule more than 40 hours per work week; however, if occasional, approved overtime occurs, the employees' time sheets will need to reflect the actual hours worked in the pay period. All hours exceeding 40 per work week will be paid at the overtime-premium rate.

#### Dispelling Myths

In considering compressed workweek arrangements, both managers and employees may be reminded of these beliefs that exist in organizations built around standard schedules. Be sure to address these myths as you discuss other issues or expectations.

**Myth: Employees working on a compressed schedule put in fewer hours than those on a standard schedule.**

**Fact:** Employees usually focus on what needs to be accomplished rather than hours logged. Just as employees on standard schedules sometimes work extra hours or weekend days, or bring work home to complete a particular assignment, so do employees on compressed schedules.

**Myth: Ten-hour days are too long.**

**Fact:** Each employee has a different threshold for days that are "too long." Employees who are successful on a compressed workweek are able to be productive for longer periods of time and sustain their productive concentration throughout the day. Those who cannot sustain this schedule will either come to realize this on their own, or should be counseled if performance falters.

**Myth: Employees on compressed schedules cannot meet client demands adequately.**

**Fact:** There are many reasons why employees are sometimes out of the office -- including client meetings, training, and vacations. Employees on standard schedules are just as subject to the demands of client work while balancing other scheduling obligations.

**Myth: Performance is defined by physical presence.**

**Fact:** "What" and "how" work is produced or accomplished is more important than "when" or "where" work is done. There is no correlation between long hours/on-site presence and superior performance. Off-site work does not automatically lead to inferior job performance.



### Flextime Flexible Work Option

#### Introduction

Flextime allows you to choose a specified, set time that each workday begins and ends. The work week remains five days, and the pay period remains 75 hours for two weeks.

#### Example

- Your workday will remain the same number of hours, but if you begin as early as 6:30 a.m. you could depart as early as 3:00 p.m., or if you begin at 10:00 a.m you could depart as late as 6:30 p.m.

#### Advantages

- Flextime does not reduce or change the total number of hours any individual works in a week, but allows this adjusted daily schedule so you can meet your individual work and life responsibilities.
- For Fannie Mae, core business hours are always covered and coverage for internal or external customers in different time zones may be extended.

#### Considerations

- A flextime workday may include designated "core hours" all employees are required to work, according to a department's particular business needs.
- As with all flexible work options, flextime may require more coordination to schedule meetings, facilitate inter-departmental communication, and plan other department activity.

#### Role of Managers

Managers play a critical role in the success of flexible work arrangements. These general guidelines should help you manage any of the flexible work options available to employees.

#### Manage for Results

- Remember that meeting business goals is our top priority.
- Develop shared measurable performance goals (results and critical success factors) to manage flexible work options successfully.

#### Be Flexible

- Flexible work arrangements often require adjustments in their beginning stages.
- Be receptive to employee, customer, and co-worker suggestions for improving the arrangement.
- Expect to do some adjusting at the outset and as often as necessary. Discuss these adjustments with the employee as needed.

#### Communicate

- Flexible work arrangements can impact existing communication patterns within a work group. Discuss the potential impact with the group, and establish guidelines for continuous effective communication.
- Decide on the most effective media, i.e., phone, voice mail, email, shared drives, etc., to ensure ongoing information sharing.

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- Coach employees in the development of a relationship management strategy.

#### Cover Core Hours

- Determine if there are divisional or departmental minimum core hours when all employees must be available.
- Communicate the core hours and recognize them as critical to the success of flexible schedules.
- Be sure that flexible scheduling and core hours work in concert to ensure satisfactory flexibility for the employee and sufficient shared work time for the work group and customers.

#### Publish and Use a Schedule

- All employees should update a group schedule on an ongoing basis, noting whether coverage is onsite or offsite.
- Consider the schedule when planning meetings. Establish team guidelines for attendance -- i.e., whether physical presence is mandatory or phone attendance is optional.
- Let customers know the flexible schedules when appropriate.

#### Get Feedback from Teammates and Customers

- Realize that teammates and customers often perceive that they are affected by a flexible work arrangement. Effective communication can address this perception.
- Continuously solicit feedback from everyone involved to ensure ongoing positive and productive relationships.
- Be prepared to act on that feedback and make adjustments accordingly.

#### Give Feedback

- Particularly in the early stages of the arrangement, an employee will need feedback on communication, performance, and any other aspects of the job or the work relationships.
- When giving feedback, be clear about any issues that arise because of the flexible arrangement.
- Provide the employee with behavioral examples that are actionable and specific.

#### Be Prepared to End It

- In the event that performance and/or business needs have been negatively impacted, it may become necessary to terminate the flexible work arrangement. Remember that a flexible work arrangement is not a benefit, accommodation, or entitlement.

#### Role of Employees

Employees with the following characteristics tend to be most successful at flexible scheduling -- in terms of enhancing their work, supporting customers and co-workers, and sustaining the business:

#### Have Strong Self-Management Skills and Be Highly Self-Motivated

- Good candidates for flexible arrangements have good time management skills and the ability to set clear priorities.
- An employee with a flexible arrangement will sometimes work when a manager or co-workers are not in the office. These conditions require that an employee has the competence and confidence to make sound business decisions without the input of others.
- Employees on flexible schedules need to be able to function sometimes with limited or no supervision. Key requirements are trustworthiness and ability to self-direct.

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**Be Flexible**

- Flexible work schedules will not work if the schedule is treated rigidly. Allow reasonable amounts of variation, a degree of accommodation and lots of communication with everyone involved.

**Avoid Invisibility**

- Some employees perceive that flexible arrangements come at the expense of career advancement. To minimize this perception, plan a relationship management strategy and act systematically to make yourself and your contributions visible.
- Action steps should include consciously making connections with others when in the office, highlighting contributions to the team in meetings, and volunteering for high-impact but manageable committees or task forces.

**Dispelling Myths**

Managers and employees should talk about these myths while discussing other issues and expectations for the flexible work arrangement. These myths about flextime schedules typically exist in organizations built around standard schedules.

**Myth: Employees on flextime will not have any predictability in their schedules, customer needs will not be met, and managers will lose control.**

**Fact:** Most employees do not make dramatic changes in their schedules that result in any significant disruptions to co-workers, managers, or customers. Flextime is really only one of many factors that result in irregular schedules -- including travel, business meetings, or other responsibilities -- all of which need to be actively managed.

**Myth: Employees on flextime will inevitably be working unsupervised and therefore unproductively.**

**Fact:** Clear performance measures are the cornerstone of any successful flexible work option. Most managers cannot watch their employees work all the time - flextime fosters an environment of "managing for results" and of self-sufficient and self-managing employees.

**Myth: Because most flextime employees come in earlier and leave earlier -- there will be no coverage during the late afternoon hours.**

**Fact:** Flextime, as with all flexible work options, must be considered within the context of business needs. Managers should use the request process to manage toward required coverage. That is why flextime is included in this formal work option request process, and not treated as an entitlement for all employees.

**General Overview - Flexible Work Options****Corporate Philosophy**

Fannie Mae is a world-class employer offering an environment where flexible and creative ways of working are supported and encouraged. The Flexible Work Options Program enables employees and managers to work together to creatively address both business and individual needs.

This approach to customized work redesign is not a benefit, accommodation, or entitlement. It is a different and better way of working, designed to enhance performance, improve quality standards and allow greater control of how work gets done. A flexible work arrangement may be terminated at any time if business demands dictate.

**Guiding Principles**

Fannie Mae has established a series of guiding principles that will govern all aspects of flexible work options. These principles are as follows:

**Meeting business goals is our top priority. All flexible work arrangements must:**

- Maintain the current standards of, or enhance, Fannie Mae's business.
- Meet the specific business needs of the work group, department, and customers.

**Employees are not entitled to flexible work options**

- Some jobs will never be an appropriate match for flexible work.
- The business needs of the department, division, or other applicable work group must be met in order for a flexible work arrangement to be implemented and maintained.
- Management will give full consideration to any requests consistent with business needs.
- All flexible work arrangements will be reviewed periodically as business needs and the organization change.

**Collaboration between managers, employees, and teams is critical**

- All affected parties must be open to discussing all pertinent facts surrounding a flexible work request.
- The ultimate responsibility for approval rests with the manager.

**Equity does not guarantee the same outcome for all employees**

- All eligible employees will have access to a consistent application process that could lead to different decisions based on the business need.
- Each request will be considered on its individual merits.

**Requests are approved or denied based on business impact, not personal needs**

- The basis of an approval is the impact to the business.
- If there is no impact, or positive impact on business, then a request may be approved.

- If there is adverse impact to business, then the request should be denied; the manager and employee must discuss the consequences to the business and consider other alternatives.
- While employees will have personal reasons for requesting flexibility, those reasons should have no bearing on the approval/denial decision.

#### Flexibility must be a two-way street

- Flexibility must be based on arrangements that meet the constantly changing needs of customers, the business and employees.
- Every attempt should be made to meet flexibility agreements.
- However, all parties and all elements of the arrangement must be flexible, recognizing that the week-to-week details of arrangements may be subject to reasonable change.
- Rigid flexibility is an oxymoron.

#### Performance is not defined by physical presence

- "What" and "how" work is produced or accomplished is more important than "when" or "where" work is done.
- There is no correlation between long hours or on-site presence and superior performance.
- Off-site work does not lead automatically to inferior job performance, nor does it indicate low interest in career or personal development.

#### Performance matters

- A combined overall performance rating of "Meets Expectations" or better, or the successful completion of the introductory employment period, is required of any employee requesting a flexible work option.
- Specific flexible arrangements may require specific skills.
- Teleworkers, for example, may require stronger-than-average self-management skills.
- Managers and employees requesting flexible arrangements will clearly and openly discuss any such performance management considerations.

#### Eligibility

Flexible work arrangements must meet Fannie Mae's overall business goals, departmental business goals, the needs of our customers, and the needs of employees. The following criteria set the appropriate expectations and monitor the success of the arrangement against goals and needs.

#### Basic criteria

- You must have received at least a "Fully Meets Minus (FM-)" rating on your last performance appraisal or successfully completed your introductory employment period.
- Your current performance must also meet performance expectations.
- Your manager must identify your job function as compatible with the requested flexible work arrangement.
- In the cases of part-time work and job sharing, the department must be able to accommodate the reduced schedule of the employee(s) involved.
- In the case of job sharing, the applicant must be able to identify another employee with similar skills willing to adopt, and be approved for, a job sharing schedule.

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- You must be willing and able to maintain flexibility as needed to meet client and departmental needs.
- Additional specific eligibility requirements for an individual's flexible work arrangement will be determined and outlined by your manager.

#### The Request/Approval Process

##### Basic Steps

These are the basic steps for requesting a flexible work arrangement:

1. Employee and manager discuss possible options.
2. Employee completes the [Flexible Work Agreement](#) form (.doc).
  - o Team mates, colleagues, and clients should be consulted during this step, as meeting schedules and process flows may be affected by the flexible arrangement.
3. Manager and employee review request together.
  - o The manager and employee discuss the consequences to the business and consider other alternatives.
  - o If there is potential adverse impact to business that cannot be resolved, then the request will be denied.
4. If request is approved, manager and employee formalize:
  - o a calendar for evaluating the work arrangement.
  - o a relationship management plan, detailing how the employee will ensure continuous effective communication with team mates, colleagues, clients, and the manager.
5. Employee and manager sign the Flexible Work Agreement form and forward it to the Human Resources Account Manager.

#### Employee Responsibilities in the Request Process

The employee is responsible for initiating a request for a flexible work arrangement. It is important for the employee to think through the process as well as the issues described above and in the request application. It is important that the employee consider the potential impact on team mates, colleagues, and internal or external customers, and to discuss the proposed flexible work arrangement with them.

An employee considering a change in employment status (e.g. converting from full-time to part-time) should contact his/her Human Resources Account Manager to determine the impact on compensation and benefits.

1. Complete the Flexible Work Agreement form.
2. Meet with appropriate team members and colleagues, if applicable, to discuss the proposed work arrangement and its potential impact on the team.
3. Schedule a time to discuss request with manager.

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4. Submit form to manager in advance of the meeting to allow for manager's proper review before the discussion.
5. Meet with manager to discuss proposed flexible arrangement.
6. Expect to revise initial Flexible Work Agreement based on discussion with manager. The purpose of this meeting is to review the proposal and for the manager to highlight issues that might be related to business or performance. The form may need to be revised more than once.
7. If a workable solution is determined, make any necessary changes to the form, then sign and submit to the manager for appropriate signature.

#### Manager Responsibilities in the Request Process

Managers create the environment in which requests are made and considered. It is important that the principles of Fannie Mae's Flexible Work Option program are reinforced in the work group and that employees understand the process for requesting, approving and managing arrangements that make good business sense.

Management of flexible work arrangements begins with clear, proactive management of the request process. Straightforward, consistent communication -- starting with the procedures and ending with a solid business rationale for approval or denial -- is essential.

1. Meet with the employee to discuss the flexible work request. Talk about any concerns and barriers. If necessary, arrange for a revised request form and/or a follow-up meeting with the employee.
2. Inform the employee as soon as possible of decision and the rationale behind that decision.
3. If approved, develop the following with the employee (and team members and customers, as appropriate):
  - o a calendar for evaluating the work arrangement.
  - o a relationship management plan, detailing how the employee will ensure continuous effective communication with team mates, colleagues, clients, and manager.
4. Forward the signed form -- whether approved or denied -- to the appropriate Human Resources Account Manager.

#### Manager and Employee Discussion

From their different perspectives, managers and employees should consider prospective flexible work arrangements using the following approach:

- Review the business requirements of the job.
- Evaluate the impact of the proposed flexible work arrangement on the ability to meet and/or exceed customers' needs.
- Discuss potential impact on, and necessary involvement of, team mates and colleagues.
- Identify potential problems or obstacles, and develop strategies for dealing with them.
- Assess any impact of the arrangement on employee compensation, benefits and unit budget.

- Develop a plan for getting the work done, including a relationship management strategy to ensure continuous effective communication with all concerned parties.
- Create a plan and schedule for evaluating the work arrangement and making modifications if necessary.

#### Why Some Requests are Turned Down

Requests may be turned down based on business needs or performance management issues. The manager must explain how the request has a potentially negative impact on business or productivity. The human resources account managers will review all requests to audit for consistency and fairness. If your request is turned down, you may appeal through normal employment dispute channels

#### General Roles of Managers and Employees

##### The Manager's Role

Managers play a critical role in the success of flexible work arrangements. These general guidelines should help you manage any of the flexible work options available to employees.

##### Manage for Results

- Remember that meeting business goals is our top priority.
- Develop shared measurable performance goals (results and critical success factors) to manage flexible work options successfully.

##### Be Flexible

- Flexible work arrangements often require adjustments in their beginning stages.
- Be receptive to employee, customer, and co-worker suggestions for improving the arrangement.
- Expect to do some adjusting at the outset and as often as necessary. Discuss these adjustments with the employee as needed.

##### Communicate

- Flexible work arrangements can impact existing communication patterns within a work group. Discuss the potential impact with the group, and establish guidelines for continuous effective communication.
- Decide on the most effective media, i.e., phone, voice mail, email, shared drives, etc., to ensure ongoing information sharing.
- Coach employees in the development of a relationship management strategy.

##### Cover Core Hours

- Determine if there are divisional or departmental minimum core hours when all employees must be available (whether by phone, email, or in person).
- Communicate the core hours and recognize them as critical to the success of flexible schedules.
- Be sure that flexible scheduling and core hours work in concert to ensure satisfactory flexibility for the employee and sufficient shared work time for the work group and customers.

##### Publish and Use a Schedule

- All employees should update a group schedule on an ongoing basis, noting whether coverage is onsite or offsite.
- Consider the schedule when planning meetings. Establish team guidelines for attendance -- e.g., whether physical presence is mandatory or phone attendance is optional.
- Let customers know the flexible schedules when appropriate.
- Encourage backup roles, where teammates share responsibility for attending meetings and disseminating information to each other.

#### **Get Feedback from Teammates and Customers**

- Realize that teammates and customers often perceive that they are negatively affected by a flexible work arrangement. Effective communication can address this perception.
- Continuously solicit feedback from everyone involved to ensure ongoing positive and productive relationships.
- Be prepared to act on that feedback and make adjustments accordingly.

#### **Give Feedback**

- Particularly in the early stages of the arrangement, an employee will need feedback on communication, performance, and any other aspects of the job or the work relationships.
- When giving feedback, be clear about any issues that arise because of the flexible arrangement.
- Provide the employee with behavioral examples that are actionable and specific.

#### **Be Prepared to End It**

- In the event that performance and/or business needs have been negatively impacted, it may become necessary to terminate the flexible work arrangement. Remember that a flexible work arrangement is not a benefit, accommodation, or entitlement.

#### **The Employee's Role**

Employees with the following characteristics tend to be most successful at flexible scheduling -- in terms of enhancing their work, supporting customers and co-workers, and sustaining the business:

#### **Have Strong Self-Management Skills and Be Highly Self-Motivated**

- Good candidates for flexible arrangements have good time management skills and the ability to set clear priorities.
- An employee with a flexible arrangement will sometimes work when a manager or co-workers are not in the office. These conditions require that an employee has the competence and confidence to make sound business decisions without the input of others.
- Employees on flexible schedules need to be able to function sometimes with limited or no supervision. Key requirements are trustworthiness and ability to self-direct.

#### **Be Flexible**

- Flexible work schedules will not work if the schedule is treated rigidly. Allow reasonable amounts of variation, a degree of accommodation and lots of communication with everyone involved.

#### **Avoid Invisibility**

- Some employees perceive that flexible arrangements come at the expense of career advancement. To minimize this perception, plan a relationship management strategy and act systematically to make yourself and your contributions visible.
- Action steps should include consciously making connections with others when in the office, highlighting contributions to the team in meetings, and volunteering for high-impact but manageable committees or task forces.



## Job Sharing

### Introduction

Job sharing is a work situation in which two similarly skilled workers split the responsibilities of one job function; in effect, each becomes a part-time employee.

The work hours and responsibilities of the job are split on the basis of time, tasks, or customers served. Each of the job "sharers" must work at least 20 hours per week in order to be eligible for benefits. The total number of hours a job share team can work is 45 per week, usually split at 22.5 hours per week per employee. With good management involvement, and careful work analysis, job sharing can occur at any level of the company, in any part of the company.

### Considerations:

- All parties involved must determine if a particular job logically can be split.
- Job sharing can be a complex negotiation, and all parties (you, your coworker, and your manager) must agree to all details of the arrangement.
- You and your coworker must:
  1. Each complete a Flexible Work Agreement form.
  2. Identify the responsibilities of each partner.
  3. Review schedule coverage for each other.
  4. Discuss communications with each other, as well as with coworkers and customers.
  5. Be prepared to handle other issues as they arise.
- Your manager must consider:
  1. Your and your coworker's past performance.
  2. Your and your coworker's demonstrated organizational skills.
  3. If you and your coworker can work together as an effective team.
  4. The job sharing must be re-evaluated if either you or your coworker leaves the arrangement, or if either does not meet performance expectations.
- A reduction in time worked will result in reduction in pay and benefits, as with any part-time position.
- Vacation leave, holidays, and other benefits will be pro rated according to your scheduled hours.

### Advantages:

- Creates part-time job opportunities.
- Can broaden the skill base and experience brought to one position by two different people.

- Allows continuous coverage and service capabilities throughout the workweek and during sick and vacation days.

### Role of Managers

Managers play a critical role in the success of flexible work arrangements. These general guidelines should help you manage any of the flexible work options available to employees.

### Manage for Results

- Remember that meeting business goals is our top priority.
- Develop shared measurable performance goals (results and critical success factors) to manage flexible work options successfully.

### Be Flexible

- Flexible work arrangements often require adjustments in their beginning stages.
- Be receptive to employee, customer, and coworker suggestions for improving the arrangement.
- Expect to do some adjusting at the outset and as often as necessary. Discuss these adjustments with the employee as needed.

### Communicate

- Flexible work arrangements can impact existing communication patterns within a work group. Discuss the potential impact with the group, and establish guidelines for continuous effective communication.
- Decide on the most effective media, i.e., phone, voice mail, e-mail, shared drives, etc., to ensure ongoing information sharing.
- Coach employees in the development of a relationship management strategy.

### Cover Core Hours

- Determine if there are divisional or departmental minimum core hours when all employees must be available.
- Communicate the core hours and recognize them as critical to the success of flexible schedules.
- Be sure that flexible scheduling and core hours work in concert to ensure satisfactory flexibility for the employee and sufficient shared work time for the work group and customers.

### Publish and Use a Schedule

- All employees should update a group schedule on an ongoing basis, noting whether coverage is on-site or off-site.
- Consider the schedule when planning meetings. Establish team guidelines for attendance -- i.e., whether physical presence is mandatory or phone attendance is optional.
- Let customers know the flexible schedules when appropriate.

### Get Feedback from Teammates and Customers

- Realize that teammates and customers often perceive that they are affected by a flexible work arrangement. Effective communication can address this perception.
- Continuously solicit feedback from everyone involved to ensure ongoing positive and productive relationships.

- Be prepared to act on that feedback and make adjustments accordingly.

#### Give Feedback

- Particularly in the early stages of the arrangement, an employee will need feedback on communication, performance, and any other aspects of the job or the work relationships.
- When giving feedback, be clear about any issues that arise because of the flexible arrangement.
- Provide the employee with behavioral examples that are actionable and specific.

#### Be Prepared to End It

- In the event that performance and/or business needs have been negatively impacted, it may become necessary to terminate the flexible work arrangement. Remember that a flexible work arrangement is not a benefit, accommodation, or entitlement.

#### Role of Employees

Employees with the following characteristics tend to be most successful at flexible scheduling -- in terms of enhancing their work, supporting customers and coworkers, and sustaining the business:

#### Have Strong Self-Management Skills and Be Highly Self-Motivated

- Good candidates for flexible arrangements have good time management skills and the ability to set clear priorities.
- An employee with a flexible arrangement will sometimes work when a manager or coworkers are not in the office. These conditions require that an employee has the competence and confidence to make sound business decisions without the input of others.
- Employees on flexible schedules need to be able to function sometimes with limited or no supervision. Key requirements are trustworthiness and ability to self-direct.

#### Be Flexible

- Flexible work schedules will not work if the schedule is treated rigidly. Allow reasonable amounts of variation, a degree of accommodation and lots of communication with everyone involved.

#### Avoid Invisibility

- Some employees perceive that flexible arrangements come at the expense of career advancement. To minimize this perception, plan a relationship management strategy and act systematically to make yourself and your contributions visible.
- Action steps should include consciously making connections with others when in the office, highlighting contributions to the team in meetings, and volunteering for high-impact but manageable committees or task forces.

#### Impact on Compensation and Benefits

- When you job share, you become a part-time employee with reduced work hours. Your total compensation, benefits and paid time off will be reduced commensurate with your reduced work hours. A minimum of twenty hours must be worked in order to be eligible for benefits.
- See Part-Time Benefits chart for a detailed comparison of full time vs. part time benefits.
- Discontinuation of a Job Share arrangement may lead to termination of employment, but does not constitute job elimination; nor does it constitute entitlement to a severance package.

#### Dispelling Myths

In considering job share arrangements, both managers and employees may be reminded of these beliefs that exist in organizations built around standard schedules. Be sure to address these myths as you discuss other issues or expectations.

**Myth: Customers and coworkers do not like working with job sharers because it requires them to communicate with two people, instead of just one.**

**Fact:** The standard for a successful job share arrangement is that all communications are consistent and that they enable rather than disable the working relationship. Often, coworkers and customers find that working with job sharers allows them to not only get good information, but also to work with a broader range of skills than only one person could offer.

**Myth: Employees working on job share arrangements are not available when they are needed, such as for customer or important internal meetings.**

**Fact:** All flexible work arrangements, including job sharing, must be driven by the needs of the business. A job share arrangement that is not flexible enough to meet internal and external customer needs should be discontinued.

**Myth: Job sharing negatively affects performance ratings and will hurt an employee's long-term career potential at Fannie Mae.**

**Fact:** There should not be a negative bias in considering the performance of job share employees. The expected contribution of job share employees will naturally be recalibrated depending on the proportion of a full-time schedule worked. With a performance management system focused on merit and contribution rather than scheduling, results should be the relevant measure. In addition, a key component of the appraisal process for this arrangement will be the assessment of the overall performance of the partnership.



### Part-Time Flexible Work Option

#### Introduction

Part-time work is a flexible work option that could allow you to work fewer hours than the standard full-time schedule.

#### Examples

- You could request a three- or four-day work week; or, you could request a 5-day schedule where you work fewer hours each day.
- A non-exempt employee could request a schedule less than 75 hours in a bi-weekly pay period (but cannot schedule more than 40 hours in a single week).
- Part-time arrangements may be created to meet the needs of different jobs and different employees.

#### Considerations

- A reduction in time worked will result in a commensurate reduction in pay and benefits.
- Vacation leave, holidays, and other benefits also will be pro rated to the number of hours you are scheduled to work.
- Eligibility for certain core benefits may require a schedule of a minimum set number of hours in a work week; contact the Human Resources Service Center for more information.

#### Role of Managers

##### A Workable Schedule

- Develop a schedule jointly with the employee that meets business and personal needs.
- Be aware that some part-timers find it helpful to be in the office on several alternating days throughout a week so that a backlog never develops, while others prefer a more concentrated schedule. Discuss an arrangement that would work best for your business unit and the people involved.

##### Clear Expectations for the Position

- Work with the employee to evaluate the position carefully and identify a realistic scope of job responsibilities in a part-time arrangement.
- Work with the employee to reality-test the proposal and clarify workloads and performance expectations.
- Be on the lookout for "workload creep" and be open to making adjustments in tasks or time as needed.
- Encourage employees to guard against trying to do a full-time job on a part-time schedule, which can have negative effects on both quality and productivity.

##### Career Growth

- See that part-timers have access to training opportunities and are allowed to spend some time on special projects, task forces, and other visibility-raising assignments.

- Include some time for developmental assignments. In reducing schedules, it is natural to focus on retaining tasks that contribute immediate value.

#### Role of Employees

##### Schedules

- The most frequent concern expressed by managers about part-timers is that "they won't be there when I need them." It is important to address this concern by figuring out when in the workweek internal and external customers, as well as interdependent co-workers, typically need the employee most.
- When designing a part-time schedule, it is important to consider if some days or parts of days are better than others to be away from work.
- Employees have to weigh their personal scheduling needs with those of Fannie Mae in drawing up a final proposal. Final approval of a schedule will be dependent on business needs.
- Flexibility about readjusting a schedule will be required if there is negative business impact.
- Part-timers should continuously communicate their schedule through an electronic calendar, an outgoing voice mail message and/or other predetermined means. Communication should be addressed in a relationship management strategy.

##### Accessibility

- One source of the "not there when I need them" concern is the tendency of some managers to equate presence with access.
- Employees can make themselves accessible for critical needs without being in the office at all times.
- It can be valuable for a part-timer to offer phone or voice mail access on days off when clients/coworkers have urgent or pressing business that only that employee can address.
- Typically people don't take up this offer lightly or very often, but an employee's willingness to be available goes a long way toward putting the "all hands on deck" issue to rest.

##### Impact on Compensation and Benefits

- A part-time arrangement means reduced work hours. Your total compensation, benefits, and paid time off will be reduced commensurate with your reduced work hours. A minimum of twenty hours must be worked in order to be eligible for benefits.
- See Part-Time Benefits chart for a detailed comparison of full time vs. part time benefits.

##### Dispelling Myths

In considering part-time arrangements, both managers and employees may be reminded of beliefs about part-time workers that exist in organizations built around full-time work as the norm. Be sure to address these myths as you discuss other issues or expectations.

**Myth: Employees working on part-time schedules are not available when they are needed, such as for customer or important internal meetings.**

**Fact:** Having employees on part-time schedules requires more thoughtful consideration of scheduling, particularly for internal meetings, training, and other activities that may require an employee's physical presence. However, reciprocal flexibility is a cornerstone of innovative scheduling at Fannie Mae for all alternative arrangements. Employees and managers must work together to ensure that business needs

are met. Adapting schedules to accommodate work demands is not problematic when the commitment to reciprocal flexibility is not abused. Whenever possible, managers should consider potential scheduling constraints of employees working on alternative schedules in planning group meetings and other activities.

**Myth: Part-time work negatively affects performance ratings and will hurt an employee's long-term career potential at Fannie Mae.**

**Fact:** The expected contribution of part-time employees will naturally be recalibrated depending on the portion of a full-time schedule worked. With a performance management system focused on merit and contribution rather than scheduling, performance is to be the relevant measure.



#### Remote Teleworking Program – Flexible Work Option Introduction

Teleworking could enable you to work out of your home, in an alternative office space near your home, or through a mobile office setting, for part of your regular work schedule. Teleworking also adds flexibility to your work day.

Clearly defined tasks and deliverables characterize jobs suitable for a telework arrangement. Together, you and your manager must determine if teleworking makes good business sense for your job and supports the needs of Fannie Mae. Technology is key to teleworking, as the tool that can make it happen and as the catalyst for a number of flexible work rules unique to this flexible work option. Keep in mind that your departmental budget for the necessary technology may have an impact on the final outcome of your telework request. In addition, job responsibilities, and therefore compensation and benefits, remain the same.

If you are considering a telework arrangement that is outside the metropolitan area of your designated Fannie Mae base location, please read the policy, guidelines, and agreement for Remote Teleworking.

#### Considerations

- Teleworkers have regularly scheduled work hours each day, during which time you accomplish the work normally performed in the office and are accessible to business contacts.
- Often, meetings with peers, supervisors, and customers can be handled easily by phone; others may require you to be present at Fannie Mae.
- The effectiveness of the telework experience, as well as your performance, will be measured by both business results and critical success factors.
- There may be income tax consequences resulting from the telework arrangement.
- Telework is not a replacement for child or elder care.
- You must work your scheduled hours as outlined in the approved agreement.
- Hours worked must be reported via standard department policy.

Fannie Mae's overtime policy extends to telework arrangements. If you are a non-exempt employee, you must receive prior approval from your supervisor before working overtime.

#### Challenges

- Reduced personal interaction between peers may decrease your ability to gain or exchange valuable information.
- Mechanisms such as e-mail, voicemail, and fax must be in place to facilitate communication between you and the office.
- You must be flexible to be on-site for critical meetings or other business activities, even if this occurs during an "off-site" day.
- Finally, a number of important issues—including equipment (i.e., computer, fax, and telephone), zoning, insurance, and the appropriateness of the remote work environment—must be addressed before a teleworking arrangement can be implemented.



**Guidelines**

As a teleworker, the following guidelines will apply:

- Teleworking is a management tool allowing for flexibility in work options for employees. It is not an entitlement, and is based on job function, work group, and the employee's past and present levels of performance.
- Teleworking will not change the basic terms and conditions of employment for a Fannie Mae employee. You will continue to be bound by all Fannie Mae policies and guidelines, including, but not limited to, those contained in the *Code of Business Conduct*.
- You will have regularly scheduled work hours agreed upon by your supervisor and performance will be measured by business results and demonstration of critical success factors. Jobs suitable for teleworking are characterized by clearly defined tasks and deliverables.
- As a Fannie Mae employee, your employment is considered "at will" and can be terminated at any time by either you or Fannie Mae with or without cause and without prior notice.
- You will be accessible during your agreed-upon schedule regardless of work location. You and your supervisor should agree upon how the teleworking arrangement will assure accessibility to your work group, clients and other business units. In order to increase accessibility, you must have a business voice line, data line and pager (if required), and you must have access to the company intranet and e-mail.
- You will continue to be subject to the employee discipline system should your performance or conduct require disciplinary action. Telework arrangements will be suspended if you enter the discipline process.
- The misuse of company time and/or company provided equipment will be grounds for immediate termination.
- Teleworking is not a replacement for child or elder care.
- Ensure that you know what types of expenses will be reimbursed prior to starting a telework arrangement. All remote teleworker expenses submitted for reimbursement must be noted on the Fannie Mae expense report. If there is no FWO agreement on file, your expense reimbursement request will be returned to you. You must use a Fannie Mae supplied laptop and all the appropriate software. Your business unit will supply you with both. Any equipment and software provided by Fannie Mae remains Fannie Mae property and is your responsibility.

Please refer to the *Managing Technology for Teleworkers Fact Sheet* and the *Reimbursable Expense Chart Examples* for additional information on technology use (reimbursables/non-reimbursables).

**Employee's Participation Criteria**

- Regular, full-time and part-time employees.
- Successfully completed your introductory employment period.
- Last performance appraisal was FM or above; current performance is meeting performance standards.
- Job function is approved as appropriate for Teleworking.
- Technology support must be available to support the job function and applications used. Budget constraints could have an impact on the final approval of a teleworking arrangement

**Hours**

- You must be available for phone calls and consultation during Fannie Mae core hours of operation (10:00 a.m. - 3:00 p.m. EST).
- You must work your scheduled hours as outlined in the approved application.
- Hours worked must be reported via standard department policy.
- Face-to-face meetings with peers, supervisors, and clients must be held on Fannie Mae premises or in client offices.

**Liability/Insurance**

- Any equipment and software provided by Fannie Mae becomes your responsibility.
- You should advise your insurance carrier of your participation to determine the level of coverage provided under your personal/homeowner's policy and to resolve any questions prior to the filing of a claim.

**Tax Consequences**

Teleworking may cause an employee to recognize additional income or incur expenses for which a tax deduction may be available.

You may wish to become familiar with tax laws that may apply to your working at home. A copy of IRS publication 587, "Business Use of Your Home," can be obtained from the IRS website or by calling the IRS at 800/829-1040. Also, for additional information, please refer to the Remote Telework Policy.

**Local Zoning**

It will be your responsibility to ascertain the applicable local zoning ordinances regarding work at home. Where a conflict exists, you are not eligible to participate.

**Technology****Expenses**

Please refer to the Managing Technology Fact Sheet and the Reimbursable Expense Chart Examples regarding information associated with telework expenses.

**Equipment/Supplies/Tools**

- Fannie Mae provides one workstation and appropriate software licenses per employee regardless of work location in most cases. Teleworkers must use Fannie Mae-supplied PC and all the appropriate software. The software remains the property of Fannie Mae. Laptops are required for those who will be using a PC at both places.
- Technology support must be available to support the job function and applications used.
- The Fannie Mae Laptop will have Microsoft Office (Word, Excel, PowerPoint, MS Access), Outlook, Remote Computing Desktop (RCD), Enterprise Remote Systems (ERS) and/or Virtual Private Network (VPN).
- The following commercial off-the-shelf applications are currently available for use with Remote Access: Outlook, Freelance, Microsoft Office (Word, Excel, PowerPoint, MS Access), MS Project, Time Tracker.

- The following Fannie Mae custom applications can also be used with Remote Access: Guide Express, MCA Study Guide, MORNET Plus Remedy, Problem Change Management (PCM), T&D Resource Guide.

#### Support

- For Fannie Mae-supplied PCs, support is obtained through the help desk. DC employees call (202) 752-7777. Regional employees call their regional help desk. Identify yourself as a teleworker and support will be provided over the phone. Teleworkers must be willing and able to follow detailed instructions, as on-site support to homes is not provided. If the problem cannot be repaired over the phone, the teleworker must bring the PC to Fannie Mae for repair. Service loaners may be provided as appropriate.
- For the data line, call 7777.
- For the voice phone line, call your phone company.
- Equipment that is not supplied by Fannie Mae will not be repaired or supported by Fannie Mae. For printer, fax, and other equipment, the teleworker is responsible for maintenance and repair.

#### Role of Managers

- Support the full team of on-site and off-site employees. Ensure participation of all employees in team meetings.
- Help the teleworker develop a relationship management strategy, to foster positive and productive relationships with team members, co-workers, and clients.
- Be sure that any issues or conflicts are surfaced and resolved in a timely and professional manner.
- Ensure all employees are coached appropriately.
- Be flexible. Not being able to see the employee does not mean they will not be productive.
- Give feedback. Particularly, in the early stages of the arrangement, an employee will need feedback on communication, performance, and any other aspects of the job.

#### Role of Employees

- Develop a relationship management strategy to effectively communicate with manager, team members, co-workers, and clients.
- Communicate consistently and work effectively without the close supervision of a manager.
- Maintain good relationships with co-workers. Team relationships are critical at times when the teleworker needs extra support from co-workers in maintaining an accurate perception of work contribution while working remotely.
- To minimize the perception that having a telework arrangement comes at the expense of career advancement, plan and act systematically to make yourself and your contributions visible.

#### Dispelling Myths About Teleworking

In considering teleworking arrangements, both managers and employees may be reminded of these beliefs that exist in organizations built around standard schedules. Be sure to address these myths as you discuss other issues or expectations.

**Myth:** There is no way to know if an employee who is not in the office is really working.

**Fact:** While not all employees are well suited to work at home, those employees for whom teleworking provides a good fit report greater focus and improved productivity during their non-office work days. Good managers measure employees' success through performance management, not through "face time."

**Myth:** It is impractical for managers to take advantage of teleworking.

**Fact:** While it may be impractical for managers to work several days a week from home, it is likely that most managers could arrange their schedules to work some portion of their workweek away from the office. Often a day or a portion of a day working from home provides managers with concentrated thinking and planning time that they may be unable to find at the office.

**Myth:** Co-workers will find it difficult to communicate with their teleworking colleague.

**Fact:** Support of teleworking requires an education process and a shift in thinking about the ability to contact employees working from home. It is critical to develop clearly established protocols for reaching employees who Telework. Participants should use all the technology tools available to them: email, phone, pager, fax, etc.



### Remote Teleworking Program Policy

Effective January 1, 2004

#### Scope

This policy applies to all Fannie Mae employees, regardless of location.

#### Definition

A remote teleworker is an employee who regularly works outside the same metropolitan area of his/her assigned business unit *and* whose telework arrangement is documented on a telework agreement approved by his/her manager and appropriate program controls, which may include review by Legal, the HR talent team, and Office of Diversity, Health and Work Life Initiatives.

#### Fannie Mae Guidelines

- The employee and manager may negotiate a full- or part-time remote telework (RT) arrangement at the time of hire or at any time during the individual's employment at Fannie Mae. The employee and manager must complete/sign the "Flexible Work Agreement," including Part II—*Agreement for Remote Teleworking*, and Part VII—*Remote Teleworker Questionnaire*, and submit them to Human Resources for review and approval.
- **The employee and manager indicate on the agreement whether the RT arrangement is for the convenience of Fannie Mae or for the convenience of the employee. HR will make the final determination based on IRS guidelines.**
- Generally, all RT arrangements are for the convenience of the employee, unless the manager establishes that working from a remote location is for the convenience of Fannie Mae. In general terms, the manager must establish that having the employee work from a remote location is necessary for carrying on Fannie Mae's business.

Additional information regarding the classification of the RT arrangement and reimbursement of related expenses can be found in the Flexible Work Agreement.

#### Tax Consequences

Teleworking may cause an employee to recognize additional income or incur expenses for which a tax deduction may be available. Fannie Mae may be required to report certain reimbursements as wages on the employee's W-2 Form and withhold taxes. The employee may wish to consult a tax advisor with respect to his/her particular RT arrangement. In addition, the employee may wish to obtain a copy of IRS Publication 587, "Business Use of Your Home." This publication can be obtained from the IRS website or by calling the IRS at 1-800-829-3676.

<http://www.irs.gov/formspubs/index.html>

### Telework/Work at Home Guidelines

#### Purpose

The UNIFI Companies are committed to assisting you in maintaining a healthy work/life balance by offering a number of flexible work schedule options. Telework is a term that describes a flexible work arrangement that allows you to work at home or other off-site location. Telework may include either all or part of your working schedule. This type of scheduling arrangement provides you and the company a more efficient way of performing some types of tasks. Telework arrangements also improve recruitment and retention of associates who are unable to commute to the work site due to conflicting work/family circumstances or as a result of a physical disability. This type of scheduling arrangement provides you with the flexibility to take care of family needs and reduce commuting time and expense. Additionally, telework benefits the community by reducing traffic and parking congestion, air pollution and energy consumption, and wear and tear on the transportation infrastructure.

#### Eligibility

You may be eligible for telework, pending approval from your manager. Requests for telework must also be approved by the appropriate senior officer/business head prior to commencement. Generally, you must have at least six months of continuous documented satisfactory service in your current position before you are eligible to request a telework arrangement. Achieving business objectives and meeting customer needs is a primary factor that will be considered in determining whether or not you and the duties you perform are eligible for telework. Characteristics of successful teleworkers include recognition as a self-starter, substantial on-the-job experience, demonstrated ability to work independently, good communication and organizational skills. Your department manager, in consultation with Human Resources and senior officer/business head, will determine if business goals can be met through a telework schedule.

#### General Guidelines

Job responsibilities and expectations are the same as if the associate were operating on site. Associates are expected to accomplish the work that ordinarily would be accomplished at the office. Specific goals and plans of accomplishment, which can be monitored on a regular basis must be agreed upon by the associate and manager and presented to the appropriate senior officer/business head for review and approval.

Telework schedules may be arranged on a flexible basis whereby an associate may work partially off-site and partially at the office. The associate's schedule should specify the number of work hours and at which site.

Frequent feedback and communication is expected and necessary for the success of telework arrangements and as such, should be part of specific goals and objectives.

Telework associates may be asked to work "core days" in the office to facilitate collaboration and teamwork. On occasion, you may be required to work in the office to allow for meetings, planning, and other activities that are better served through face-to-face interaction.

All newly approved telework schedules may be reviewed at the end of an initial three-month period to evaluate the feasibility of extending the arrangement. It may be necessary to adjust, suspend, or terminate the arrangement if business or performance objectives are not met.

**Requesting Telework**

For more information about telework arrangements, please contact your manager or Human Resource representative to review the associate and management guide to telework arrangements and telework agreement.

**TELEWORK APPLICATION PROCESS:**

**Instructions:**

1. Review the UNIFI Companies Telework/Work At Home Policy.
2. Complete the information in Section 1 below and return the entire form to your immediate manager.
3. If your request is approved, you will be asked to work with your manager to complete the Telework Agreement that details management and associate responsibilities.

**SECTION I: Completed by Associate**

**Name:** \_\_\_\_\_ **Date:** \_\_\_\_\_

**Title:** \_\_\_\_\_ **Phone:** \_\_\_\_\_

**I have read and understand the Telework policy and guidelines.**  
 \_\_\_\_\_ **Yes** \_\_\_\_\_ **No**

**Proposed Telework Schedule:**

**Office:** Mon Tue Wed Thu Fri **Remotely:** Mon Tue Wed Thu Fri

**Proposed Start Date:** \_\_\_\_\_

**I have a place for a dedicated office in my home:** Yes\_\_\_\_ No \_\_\_\_

**I am requesting a telework arrangement for the following reasons:**

\_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_

**Position Information:**

How long have you been in your current position? \_\_\_\_\_

**Associate Signature:** \_\_\_\_\_ **Date:** \_\_\_\_\_

*Upon completion of this section, please forward the completed form to your immediate manager.*

**SECTION II: Completed by Immediate Manager**

I have reviewed the telework application completed by \_\_\_\_\_ and concur with the information provided. I have become familiar with the program policy and guidelines. We have discussed telework and how it would work for us. Based on the information:

\_\_\_ **I recommend this associate for a telework arrangement.**

\_\_\_ **I do not recommend this associate for a telework arrangement.**

Please explain why this individual would or would not be a good candidate for telework:

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Manager Signature: \_\_\_\_\_ Date: \_\_\_\_\_

*Upon completion of this section, please forward entire form to the Senior Management Officer in your area (or their designee) for concurrence.*

**SECTION III: Completed by Senior Management Officer**

\_\_\_ I approve of this associate's participation in a telework arrangement.

\_\_\_ I do not approve of this associate's participation in a telework arrangement.

Senior Management Officer Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Associates will be notified of the decision by the immediate manager.

**ASSOCIATE TELEWORK AGREEMENT**

This is an agreement between \_\_\_\_\_ (manager) and \_\_\_\_\_ (associate) to begin a telework arrangement. Participation is voluntary and may be terminated or revised at any time by the manager or the associate per this agreement.

**It is agreed that:**

The telework site will be: \_\_\_\_\_

The associate will check the voice messaging system and e-mail as follows: \_\_\_\_\_

The associate will remain in contact with his/her manager as follows: \_\_\_\_\_

The associate will remain in contact with co-associates as follows: \_\_\_\_\_

**Telework schedule will be:**

Days: \_\_\_\_\_

Hours: \_\_\_\_\_

Core hours of availability by phone as follows: \_\_\_\_\_

**Primary office schedule will be:**

Days: \_\_\_\_\_

Hours: \_\_\_\_\_

**Equipment Needs: (To be determined by associate, manager, and IT)**

**Associate must have the following equipment at home for a telework arrangement:**

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**Associate already has the following required equipment at home:**

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**Manager and associate statement of work goals, objectives, tasks, anticipated results and evaluation criteria: (attach if more space needed)**

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Associate agrees to keep his/her manager informed of progress on assignments worked on at the alternative work location, and any problems which may be experienced.

Associate agrees to structure his/her time to ensure attendance at required meeting and events as designated by management.

Associate understands and accepts the special responsibility as a remote worker. A special effort will be made to stay current on departmental events that affect his/her work that occur on days while working remotely.

This telework arrangement shall begin on \_\_\_\_\_ and will be reviewed after an initial 90 day period, if not sooner, to determine whether the arrangement will be extended. Violation of the telework policy and guidelines, this agreement, or initiation of corrective or disciplinary action may cause immediate termination of the telework arrangement.

I understand and agree to the terms and conditions of this agreement:

I have read and understand the principles and guidelines for the UNIFI Companies' Telework Program. I agree to abide by the duties, responsibilities and conditions expressed in that document, in addition to my normal duties, obligations and responsibilities as an associate of a UNIFI company.

I further understand that this agreement does not override the basic terms and conditions of my at-work employment. I also understand that my participation in telework is voluntary.

I understand it may be required that management visit my home office to ensure it is in compliance with company safety and performance policies. I agree to abide by the telework agreement. I agree to participate in evaluation activities undertaken as part of the telework program. I agree to structure my work time and work location as outlined, and report any telework related problems that I may experience to my manager.

**Associate's Signature:** \_\_\_\_\_ **Date:** \_\_\_\_\_

**Manager's Signature:** \_\_\_\_\_ **Date:** \_\_\_\_\_

**Please return a copy of the entire telework package to Human Resources.**



**Compressed Work Week Policy**

**Purpose**

A compressed work schedule allows a full-time associate to complete 80 hours of work in less than the regularly scheduled 10-day biweekly pay period. Use of this alternative work schedule enables each UNIFI Company to improve service to customers, vendors and our West/East Coast business operations by offering extended hours of operation. This is often achieved through a 4-day workweek of 10-hour days although other schedule designs may be approved. A compressed schedule can reduce commuting and childcare costs as well as increase opportunities to fulfill personal obligations.

**Eligibility**

All full-time exempt and nonexempt associates are eligible to request a compressed workweek schedule pending approval from their manager. *Not all positions are suitable for a compressed schedule.* Your manager will determine if business goals and customer service expectations can be met through a compressed schedule.

**Guidelines**

Individual compressed work schedules may be established in accordance with business goals and the provisions of superior service to internal and external customers. You and your manager must agree upon the number of hours and days you work through a compressed schedule. Managers considering allowing a compressed schedule that requires an associate to work more than 40 hours in a week must contact Human Resources as this may result in overtime pay being required.

Business meetings, whenever possible, will be scheduled during your days in the office. Occasionally it may be necessary for your manager to adjust or terminate your compressed schedule to meet departmental requirements, e.g., the maintenance of minimum unit coverage. When possible, as much advance notice will be provided related to work schedule changes, however, you may be called upon to work outside of the compressed work schedule when unforeseen business needs require your presence.

You may request modifications to a compressed schedule with prior notification through your manager. Once determined, your schedule may only be modified with the concurrence of your manager. In the interest of minimizing the disruption that may result from frequent changes in schedule, the number of changes should be limited. Associates are encouraged to work a designated schedule for a minimum of three months before requesting a change of hours.

Although this schedule replaces the standard work schedule, you are still expected to comply with standard policies and procedures regarding tardiness and absences.

### Requesting a Compressed Schedule

Your manager may initiate compressed workweeks in order to provide continuous periods of coverage. You may request a compressed work schedule by submitting a written request to your manager and discussing the request with your manager. The request should detail the proposed schedule including the number of hours and days you would like to work, the duration, and any other necessary arrangements needed to ensure that internal and external customer needs and business objectives are met. The request should address the following:

- Impact on customer service, staffing requirements and job performance
- Work flow and productivity
- Meeting job responsibilities

Your manager, in consultation with Human Resources, will evaluate the feasibility of the compressed work schedule.

**Impact on Paid Leave:** Your PTO hours will follow the hours of your schedule. For example, if you work 10 hours every Thursday, you would use 10 hours of PTO if you take a Thursday off. Consult with Human Resources to assure compliance with wage/hour regulations and paid time-off policy.

#### Impact on Paid Holidays:

Associates may be offered an alternate floating holiday when a paid holiday falls on an associate's regularly scheduled day off. Associates may also be allowed to rearrange their schedule during a holiday week to ensure they are appropriately compensated and granted holiday time off, provided this is consistent with business needs. See the Overtime and Compensation and Reporting Policy for information on non-exempt associate holiday time.

*Please note that when business conditions warrant or in the event of scheduling conflicts, it may be necessary to suspend or terminate a specific flexible work arrangement. A flexible arrangement may also be terminated or suspended if your job performance falls below acceptable levels. Whenever possible, 30 days advance notice will be given before a change in the alternative schedule will become effective.*

### Flextime Policy

#### Purpose

Flextime allows you to choose your starting and ending hours around the "core hours" established by each UNIFI Company. Core hours are the designated period during the normal workday during which most associates are expected to be present. Typically, core hours are 10:00 a.m. to 3:00 p.m. "Flextime" is the time that may vary an associate's arrival and departure time before and after core hours. The primary purpose of flextime is to enhance each Company's ability to provide superior customer service and to achieve business objectives as well as facilitate a better work/life balance for the associate.

#### Eligibility

All full-time exempt and nonexempt associates are eligible for flextime pending approval from their managers. **However, not all positions are suitable for flextime.** Your manager will determine if business goals can be met through a flexible schedule.

#### Guidelines

Flextime does not change the total number of hours scheduled per week or the time required to complete work. Associates, in conjunction with their managers, should pre-select the starting and departure time. You may be required from time to time to work outside your flextime schedule to support business requirements. Whenever possible, meetings will be scheduled during core hours. However, you must be available to come to the office or to work regular hours whenever asked to do so.

Occasionally it may be necessary for your manager to adjust or terminate your flextime schedule to meet departmental requirements, e.g., the maintenance of minimum unit coverage. Modifications may be made to a flextime schedule with prior notification and manager approval. In the interest of minimizing the disruption that may result from frequent changes in schedule, the number of changes initiated by the associate should be limited. It is suggested that you work a designated flextime schedule for a minimum of three months before requesting a change of hours. You are still expected to comply with standard policies and procedures regarding tardiness and absences.

#### Requesting a Flextime Schedule

A manager or an individual associate may initiate the request for flextime. You may request a flextime schedule by submitting a written request to your manager and discussing the request with your manager. The request should detail the proposed schedule, duration, and any other necessary arrangements needed to ensure that internal and external customer needs and business objectives are met. The request should address the following:

- Impact on customer service, staffing requirements and job performance
- Work flow and productivity
- Meeting job responsibilities

Your manager, in consultation with human resources, will evaluate the feasibility of the flextime schedule

*Please note that when business conditions warrant or in the event of scheduling conflicts, it may be necessary to suspend or terminate a specific flexible work arrangement. A flexible arrangement may also be terminated or suspended if your job performance falls below acceptable levels. Whenever possible, 30 days advance notice will be given before a change in the alternative schedule will become effective.*

### Job Sharing Policy

#### Purpose

The purpose of job sharing is to divide the responsibilities of a full-time position so that two associates can share the workload of one position. Job sharing is distinct from regular part-time in that there is a conscious attempt to merge the efforts of two associates (the job sharing "team") into one job. Job sharing offers an opportunity to better balance work and personal tasks and responsibilities through reducing hours worked while still maintaining a career. The advantage to each UNIFI Company is the continuity of coverage as well as potential for a wider breadth of skills and experience that two associates bring to a job that is shared. Job sharing is intended to be a single shared workload, a single salary expense and one set of benefits. While the division of working hours could be established in a way that could allow both incumbents to receive benefits, managers considering this type of arrangement must take the additional expense of a second set of benefits into consideration as well.

#### Eligibility

Positions eligible for job sharing generally are roles with a clear division of responsibilities. Potential job sharing teams may be eligible for job sharing if they have a demonstrated track record of successful performance or have achieved a performance rating of "Competent" or better during the immediate past performance rating period. Managers will carefully consider both the position responsibilities and individual incumbent strengths and weaknesses when evaluating the feasibility of job sharing arrangements. **Thus not all positions or individuals would be suitable for this alternative work schedule.** Management, in consultation with human resources, will determine if business goals and customer service expectations can be met through job sharing.

#### Guidelines

The job sharing team consists of two members each working a portion of the 40-hour workweek. The team is responsible for determining the individual schedules with management concurrence as long as the required position coverage is achieved. Team members may alternate days, split hours worked in a day or overlap hours. Team members also are responsible for covering each other's non-work days in order to staff a regularly scheduled full-time position.

Job sharing should be established by the department in accordance with business goals and the ability to provide superior service to internal and external customers.

The following items will be taken into account when considering a job-sharing proposal:

- What days and hours will each team member work?
- How much overlap will there be?
- How will the team handle important meetings, conference calls and so on?
- How will the team communicate?
- How will the team split salary and benefits?
- How will performance evaluations be conducted?

Associates and/or managers who want to consider a job sharing option should consult with their local human resources department.

#### Requesting Job Sharing

Potential job sharing teams may request job sharing by providing a written request to their manager for their review. The request should include the following:

- Reason the associates are requesting the flexible work arrangement
- Strengths of the associates comprising the team to include experience and skills
- Proposed schedule to indicate how time will be divided
- Proposed work plan to include how tasks and responsibilities will be divided
- Communication techniques to include how the team will communicate with each other, with the supervisor, with co-workers and with clients/customers

All newly approved job-sharing schedules may be reviewed by the manager at the end of an initial three-month period to evaluate the feasibility of extending the arrangement. It may be necessary to adjust, suspend, or terminate the arrangement. As with all work/life flexible work arrangements, the job sharing arrangement may be periodically adjusted, suspended or terminated at any time in order to meet departmental requirements and ensure the balance of the workload is maintained.