

An Out-of-State Experience.

Establishing an alternative workplace.

Editor's note: In the November 1999 issue of ASSOCIATION MANAGEMENT, the cover story package of articles, "Out-of-Site Work Options," explored ideas for flexible work arrangements. In one article, an association executive described telecommuting (or telework as it is sometimes called) from the perspective of the staff person working off site while reporting to an on-site supervisor. In this article, two association executives from the Produce Marketing Association, Newark, Delaware, describe turning the tables by creating an off-site workplace for a department supervisor. Co-authored by Terry Humfeld, CAE, and Cindy Seel, CAE, the article is presented in Humfeld's voice for purposes of clarity.

In 1998, the Produce Marketing Association, Newark, Delaware, faced a choice: Lose a valuable, well-trained employee who needed to move to another state or explore the option of having her work from her new home. PMA had lost several management-level employees during the previous few years, and it was becoming increasingly difficult to recruit top quality, high-performing employees to live and work in the Newark area, particularly in a tight nationwide labor market.

From the perspective of the relocating employee, Cindy Seel, CAE, quality of life was the primary issue. She needed to focus on the relationship with her future husband, who was required to work in Richmond, Virginia, for several more years.

So Cindy and I--with the full support of PMA's president, Bryan Silbermann, CAE--developed a plan that would enable her to continue working as the director of produce divisions from her new home in Richmond, 240 miles away. In this capacity, Cindy would be responsible for two division boards, several budgets, work requiring extensive travel--all while supervising four staff members based in PMA's Newark office. She would maintain extensive contact with staff and members and remain heavily involved in PMA's day-to-day business activities.

Revising the telecommuting model

Our plan offered an alternative workplace arrangement in which a full-time employee with management responsibility would work in a remote location on a regular basis and travel to the main office periodically. Although similar arrangements may be popular in large organizations, this approach was new territory for PMA.

The success of such workplace arrangements largely depends on the personal characteristics and work habits of the employee, as well as the level of support from all staff. For example, the employee involved should have an entrepreneurial spirit and the ability to focus on goals, juggle multiple tasks, take the initiative in getting projects started, and follow up as needed. Such an employee needs to be a strong communicator, with excellent listening and people skills. Flexibility is a virtue because most new endeavors require change and adaptation. Finally, the employee must possess self-discipline and be able to balance work and home.

Cindy, who had worked at PMA for a year, had built strong working relationships with staff and had demonstrated these personal characteristics and work habits. Our real challenge would be integrating this new work arrangement into PMA's workplace culture. "How would her staff respond?" we wondered. "How would the rest of the staff respond?"

Adapting the organizational culture

PMA's workplace culture places high value on trust, fairness, and cooperation. We use a team-based approach to plan and coordinate projects, services, and events. Staff members are readily available to one another as needed so tasks and projects can be handled efficiently. Even though voice mail and email are fully integrated into the workplace, we rely on face-to-face meetings with our staff for much of our work.

At PMA, we believe in having fun while working hard. We hold frequent lunches and recreational activities throughout the year, bringing staff members together in settings where they can develop relationships based on trust and understanding. Given this culture, senior management asked, "How will staff adapt to working with an employee whose permanent office isn't in the same building?"

With such questions in mind, Bryan Silbermann led the discussion announcing the new working arrangement to all staff. The presentation covered five areas.

1. The basis for the decision. We explained why senior management wanted to retain Cindy rather than hire a new director.
2. The availability of this option to other employees. We emphasized that we would be testing the arrangement for one year and that requests for similar arrangements would not be addressed until we had fully evaluated this one.
3. The details of the current arrangement. We described how we expected Cindy to continue to participate in future meetings by conferencing in by phone and by videoconferencing. We encouraged staff to simply pick up the phone and call her if they had a question or use e-mail for inquiries that didn't need an immediate response. We explained that last-minute approvals of documents, marketing materials, and so forth would be handled by faxing or c-mailing copy to her and by giving more responsibility to her staff for handling such approval requests.
4. The telecommuting schedule. We let staff members know that Cindy would be in the Newark office at least two or three days a month but that she would not have a permanent office there. We made her schedule available to all staff so that everyone would know when to expect her in our office.
5. Suggestions on how staff could contribute to the effectiveness of the program. Our general message to staff was to expect changes in how they worked with Cindy and to help us develop processes and procedures to make this arrangement successful. Cindy's staff enthusiastically supported the concept from the beginning and understood that they would be expected to assume more responsibilities. Because remote supervision of staff was new to PMA, I agreed to assist, if needed.

Business as usual, sort of Cindy moved to Richmond in July 1998, setting up an office in her home. PMA provided the software and hardware, including a laptop with a docking station, monitor, modem, and printer. We also purchased a fax machine with copying capability, office furniture, and a telephone.

Cindy had two phone lines installed in her office, one for the fax machine and the other for her telephone, as well as an ISDN line giving her Internet access at 128k. We settled on the ISDN option because high-speed data lines to Virginia were expensive and Internet options were limited. PMA's telephones transferred incoming calls directly to Cindy's Richmond number, making the arrangement largely transparent to members.

For all intents and purposes, it soon became--and remains--business as usual. Cindy and her staff communicate frequently by phone. In addition, she and her staff use e-mail to pose questions, provide updates, and review documents.

PMA uses quarterly feedback meetings among supervisors and individual staff to build relationships, set goals, and develop skills. Because she has a strong relationship with her staff, Cindy is able to conduct these feedback sessions by phone without losing the personal touch. Her staff also visits her Richmond office.

She encourages all staff to think carefully about whether they really need face-to-face meetings with her, and if so, to schedule them far in advance. Cindy attends many of these meetings when she is in the PMA office; she successfully handles others via conference calls.

Problems we encountered

Did we encounter bumps and bruises along the way? Yes, most of them technical; a few interpersonal. Here are three technical problems that challenged us.

* Lack of LAN access. Cindy did not have remote access to our local area network (LAN) because extending the network node would have been costly and we were converting to a new association management software package. We decided to wait on a LAN connection until the conversion was complete--a decision that caused inconveniences and difficulties. For example, file sharing often required a staff person at headquarters to e-mail files to Cindy. While this worked most of the time, it was ineffective for budget spreadsheets.

To compensate, Cindy maintained several division budgets on her hard drive and copied the files trips to PMA. Maintaining two sets of budget spreadsheets sometimes led to confusion as to which information was the most current. This situation required our finance department to be creative, to modify its standard operating procedures, and to allow more time for requests and information sharing.

Because of the arrangement, Cindy's staff members have taken on new responsibilities that require them to have a better understanding of the department's budgets.

* Scheduling conflicts. Cindy accessed e-mail and her calendar through PMA's Web site, which was slower than connecting via the LAN. Because she was accessing the office calendar remotely, Cindy could not accurately check other staff itineraries to schedule meetings and sometimes other staff could not accurately determine her schedule. This led to double bookings or missed appointments. We partially resolved this problem by having Cindy's staff schedule meetings that involved numerous staff members.

* Lack of visual cues. PMA purchased a teleconferencing phone to allow Cindy to participate in larger meetings. This system has worked well except for budget and brainstorming meetings where visual cues are important. This situation will be corrected when we add videoconferencing later this year.

How can we improve?

Within a few months of the move, senior management knew this arrangement could work on a long-term basis. To discover how we could improve the situation, we encouraged managers to speak with those reporting to them to uncover any issues and concerns. In 1999, we evaluated the alternative workplace arrangement by asking key stakeholders--Cindy, her staff, all management staff, two volunteer leaders with whom Cindy worked closely--to respond to questionnaires. (See sidebar, "Questions to Ask Stakeholders.")

The majority of staff agreed that this arrangement was effective--largely because of Cindy's personal characteristics and work habits. Interestingly, some association employees perceived that she was unavailable to them when she was at headquarters because her staff monopolized her time. From their perspective, her staff members believed other association employees monopolized her time. As a result, Cindy now makes a conscious effort to schedule roughly 50 percent of her time in the office with her staff and 50 percent with other association employees.

A few employees expressed continued concerns, which we addressed, about the efficiency of remote supervision of staff. Others wondered how Cindy would build and develop relationships with new and existing employees. As a result, she now schedules working lunches with key association employees. These informal gatherings are helpful in building relationships with employees with whom Cindy works on a regular basis. I have also found it useful to schedule a working lunch with the four directors in my department whenever Cindy is working in Newark.

The volunteer leaders we surveyed expressed no concerns. Fortunately, they have not experienced any changes in effectiveness or efficiency when working with Cindy.

What's next?

As a result of this positive experience, PMA has approved an additional alternative workplace arrangement for another employee. Furthermore, we have adopted formal policy and procedures for other alternative work arrangements, including telecommuting and compressed time.

Cindy's ISDN line is now history. By upgrading to an SDSL line and using an encrypted PC Anywhere remote connection, we have resolved most of our previous technical difficulties. Improvements in technology will only enhance this and future arrangements.

We have found that successful implementation of an alternative workplace arrangement requires complete trust, open communication, access to the proper technology, an expectation that staff will learn to work in this new environment, and regular evaluation. We believe that the successful associations of the future will explore and adopt alternative workplace arrangements to compete for and retain the best and brightest employees.

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Questions to Ask Stakeholders

To evaluate the alternative workplace arrangement initiated at the Produce Marketing Association, Newark, Delaware, we obtained feedback from everyone affected by the program. We posed to five groups of stakeholders--including the employee working offsite (Cindy Seel, CAE, director of produce divisions) and her supervisor (Terry Humfeld, CAE, vice president)--relevant questions from which to gain input.

1. SENIOR MANAGEMENT AND DEPARTMENT HEADS

- * How can we ease communication difficulties between the off-site director (Cindy Seel, CAE) and her staff?
- * What teleconferencing difficulties have you noticed?
- * When are face-to-face meetings necessary?
- * Has your perception of the quality and quantity of work produced by the department changed?
- * How can we enhance the arrangement?

2. THE ALTERNATIVE WORKPLACE EMPLOYEE (CINDY SEEL)

- * What difficulties has this arrangement posed for you?
- * Has the change in your office location influenced your productivity?
- * How has your location influenced staff relationships?
- * How has your location affected your morale and sense of belonging to the organization?
- * What difficulties have you experienced in supervising or developing staff?
- * What impact has your new arrangement had on your relationship with your supervisor?

Are you obtaining maximum value for your time spent at headquarters?

How has your office location influenced your work with volunteer leaders and other association members?

3. STAFF MEMBERS SUPERVISED BY SEEL

- * What are the advantages and disadvantages for you of this arrangement?
- * In terms of your relationship with your supervisor, how has the off-site workplace influenced her communication, supervision, and leadership?
- * Have you noticed negative or positive impacts on your department and other departments?
- * How has the arrangement influenced the department's productivity?
- * What job changes have been necessary given your supervisor's distant location?
- * What has been the impact on members?

4. CINDY SEEL'S SUPERVISOR (TERRY HUMFELD)

- * Have you noticed changes in the productivity of the department?
- * How have you changed the way in which you supervise this employee, as compared to the way you supervised her on site?
- * What kind of impact on members, board members, and leaders have you noticed?
- * How has Seel's distant location influenced her relationships with other association staff members?

5. VOLUNTEER LEADERS

- * Has the arrangement inhibited your access to this staff person?
- * Have you noticed a change in staff responsiveness?
- * What impact, if any, has this arrangement had on the work of boards, committees, and task forces?

15 Commandments for Alternative Workplace Arrangements

1. Develop a culture within your association of trust and teamwork, as well as a shared vision.
2. Give staff members time to make the cultural shift to the new work arrangement and provide them with opportunity for feedback.
3. Invest in technology that will enhance communication and improve efficiency of work processes.
4. Ensure that the employee chosen to work off-site possesses self-discipline and a strong work ethic.
5. Emphasize to all staff the need for flexibility especially at the start of the arrangement.
6. Emphasize the value of good communication and listening skills among all stakeholders.

7. Require the off-site employee to make arrangements with outside vendors for repairs and service problems related to the off-site workplace.
8. Ensure that the off-site employee submits and receives regular communication, updates, and progress reports.
9. Use an off-site employee's time at headquarters to deal with issues that require face-to-face encounters such as developing staff, planning projects, brainstorming new ideas, and building relationships.
10. Ask an off-site worker to make an extra effort to work with direct reports and maintain an interactive, positive relationship with them.
11. Remind all headquarters staff to plan ahead for meetings that involve an off-site employee--by distribution the schedule and any handouts in advance by compensating for visual aids presented during meetings that the employee participates in via teleconference or videoconference and so on.
12. Require the off-site employee to work an allotted amount of time at the headquarters office. A few days a month seems adequate.
13. To avoid burnout advise the alternate-site employee to give thought and attention to maintaining a distinct separation between work and personal life.
14. Involve staff in the development of new alternative work arrangements.
15. Consider offering a market basket of flexible and alternative arrangements that will benefit your entire staff.

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