RETIREMENT ON YOUR TERMS

Freedom to Work

About Freedom to Work 2

Eligibility 3

Custom Schedule Option 4

Emeritus Option 5

How to Apply 6

Frequently Asked Questions 8

Enrollment Form 10

Appendix

Freedom to Work Pay Examples 11

Program Self-Assessments 12

Knowledge Transfer Proposal Worksheet 14

Work Redesign Proposal Worksheet 15



2027

About Freedom to Work

Freedom to Work (FTW) is a unique approach to retirement at Abbott. FTW is voluntary and helps you **ease into retirement on your terms** by allowing you to stay engaged with work while enjoying time to pursue other interests. The program also allows Abbott to set up a structured way for you to share your knowledge and experience with others before you officially retire.

With Abbott's FTW, you could train or mentor others, try a new role to build skills, and use your new free time to address personal or family matters that need your attention. FTW is one example for how we provide the development opportunities that help our employees to achieve their full potential.

FTW is a Win-Win

This program allows employees interested in retirement to continue contributing and earning. While you prepare for your personal retirement, FTW allows Abbott to prepare as well. It allows the company to systematically transfer your business knowledge to other employees before you leave. This commitment to **knowledge transfer** is required for all FTW participants and contributes to the program's success. For each year that you participate in the program, you and your manager will work together to create a knowledge transfer plan.

Our goal is to find the best way to make your continued role at Abbott a challenging and engaging one for you, while transferring your knowledge back to your group to ensure business continuity.

FTW Program Options

As you think about your retirement, consider which of our two FTW programs may be right for you: the **Custom Schedule Program** and/or the **Emeritus Program**.

THE CUSTOM SCHEDULE PROGRAM

The Custom Schedule Program allows you to **reduce your work schedule while maintaining your current job or role**. Your pay/bonus is reduced in accordance with your reduced schedule, however you don't see a significant impact on your full-time benefits.

THE EMERITUS PROGRAM

The Emeritus Program allows you to **maintain your schedule, pay and benefits, but take a step back in areas of responsibility**. For instance, if you're a people manager, you may decide to become an individual contributor.



Eligibility

To be eligible for Freedom to Work, you must meet the following criteria, depending on the option. Some employees may be eligible for both program options.

Custom Schedule Program criteria

To qualify for the Custom Schedule program, you must meet the following criteria:

- Be age 55 or older
- Have 10 years or more of Abbott service*
- Meet or exceed performance expectations
- Obtain manager approval

Emeritus Program criteria

To qualify for the Emeritus program, you must meet the following criteria:

- Be age 55 or older
- Have 10 years or more of Abbott service*
- Meet or exceed performance expectations
- Be in job grade 18 or above
- Obtain manager approval
- Obtain Division Vice President approval

* *If you joined Abbott as a result of an acquisition, pre-acquisition service at the acquired company does not count toward this 10-year requirement.*

Custom Schedule Option

The Custom Schedule Program is available to employees at any grade with manager approval. You must be age 55 or older and have 10 or more years of Abbott service in the year you are enrolling and achieve or exceed performance expectations.

How it Works

The Custom Schedule Program allows you to **reduce your work schedule while maintaining your current job or role**. Your pay/bonus is reduced in accordance with your lowered schedule, but you will not see a significant impact on your full-time benefits. See benefit details below.

Your Reduced Schedule

In the Custom Schedule Program, you can choose to:

1. Work four days per week all year, or
2. Work five days per week, but purchase additional weeks of time off (up to a maximum of five weeks)

IMPORTANT REMINDERS

- Your FTW application must be submitted during the annual FTW enrollment period, which aligns with benefits open enrollment. You are encouraged to start conversations with your manager early so your application is complete and ready to be submitted when the application window opens.
- You must enroll each year for a January 1 effective date.
- You must have your manager's approval.

Your Pay & Benefits

Your base salary remains the same when you participate, however, if you reduce your hours, your pay will be reduced accordingly through a pre-tax payroll deduction. Keeping your benefits intact is one of the characteristics that distinguishes Freedom to Work from a traditional part-time or flexible work option.

The only difference in benefits between working full time and participating in FTW is that your pension (if eligible) and 401(k) benefits will be based on your full-time salary and your reduced bonus (as opposed to your full-time bonus). Your health and well-being benefits do not change. Please note, you cannot participate in both FTW and the Vacation Buy program. Enrolling in one will make you ineligible for the other.

Am I a good fit for the Custom Schedule option?

To understand if the Custom Schedule Program is right for you, consider the following questions and be ready to discuss your readiness with your manager.

- Do I meet the eligibility criteria?
- Can I shift my job requirements in a way that fits a shorter workweek?
- Will I be able to document my tasks in order to share knowledge?
- Am I organized enough to meet expectations on a reduced schedule?
- Can I commit to meeting my manager regularly for review?

For a better understanding, take the **Custom Schedule self-assessment** found on **page 12** in this handbook.

Emeritus Option

The Emeritus Program is available to employees grade 18 and above, with Manager and Divisional Vice President approval. You must be age 55 or older and have 10 or more years of Abbott service in the year you are enrolling and achieve or exceed performance expectations. Eligible employees can alternately participate in the Custom Schedule Program or choose to participate in both the Emeritus and Custom Schedule programs, with appropriate approvals.

How it Works

The Emeritus Program allows you to **maintain your current schedule, pay and benefits, while reducing your responsibilities**. If you are considering retirement, this program offers you a unique opportunity to scale back your work responsibilities while continuing to make valuable contributions to the business and build your retirement income.

Some examples of changing responsibilities are a people manager becoming an individual contributor, a district sales manager becoming a sales representative or a director becoming a project manager.

Your Schedule, Pay & Benefits

If you participate solely in the Emeritus Program, your schedule, pay, and benefits remain unchanged.

Am I a good fit for the Emeritus option?

To understand if the Emeritus Program is right for you, consider the following questions and be ready to discuss your readiness with your manager.

- Do I meet the eligibility criteria?
- Can I reduce my responsibilities and delegate some of my work?
- Will I be able to take direction from someone I once supervised?
- Can I commit to meeting my manager regularly for review?

For a better understanding, take the **Emeritus self-assessment** found on **page 13** in this handbook.

IMPORTANT REMINDERS

- Your FTW application must be submitted during the annual FTW enrollment period, which aligns with benefits open enrollment. You are encouraged to start conversations with your manager early so your application is complete and ready to be submitted when the application window opens.
- You must enroll each year for a January 1 effective date.
- You must have your manager's approval and approval from your Division Vice President.

How to Apply

1. Take the **self-assessments** located at the end of this handbook to determine which FTW option is right for you.

2. Talk with your manager about your interest in FTW. It is up to you to initiate the process.

3. Propose a FTW arrangement by completing the following forms found on **page 14–15** in this handbook:
   - The Knowledge Transfer worksheet (for Custom Schedule and Emeritus)
   - The Work Redesign worksheet (for Custom Schedule)

4. Together with your manager, review the proposal and determine the amount of time you expect to participate in the program to ensure business continuity.

5. Once your manager has given approval (and DVP for Emeritus applications), complete and return the **Enrollment Form** (located on **page 10** in this Handbook) to the Abbott Health Benefits Center (Businessolver) by emailing the completed form (including all required signatures) to **abbottforms@businessolver.com** by the end of the annual enrollment period.

Upon Approval

Once your application is approved, you can begin your FTW option on January 1. Set up quarterly progress meetings with your manager and make any necessary adjustments.

If your FTW option is working successfully, and you want to continue another year, you will need to re-enroll during the annual FTW enrollment period to continue participation. You can participate in FTW yearly, pending approval.

Key Dates & Deadlines

JULY – SEPTEMBER

Begin conversations with your manager regarding your interest in FTW and your plan to successfully use the program. If approved by your manager, complete the FTW application, including the required signatures.

FTW ENROLLMENT

FTW enrollment occurs each year during the annual benefits open enrollment period. You have until 11:59 PM (Central Time) on the final day of open enrollment to submit your completed FTW application to the Abbott Health Benefits Center (Businessolver). Applications received after this deadline will not be accepted.

JANUARY 1

Your FTW program option begins at the first of the year.

QUARTERLY PROGRESS BRIEFINGS

You need to schedule quarterly progress briefings with your manager to ensure the program is working for everyone.

Work with Your Manager

If you're considering a Freedom to Work arrangement, initiate a discussion with your manager. Together, you and your manager can determine which option is best for you and the team. When you meet with your manager, come prepared with the following:

- Your knowledge transfer worksheet
- Your work redesign proposal
- The estimated length of your FTW participation
- Your self-assessment
- The FTW enrollment form

Remember, you will need your manager's approval. Enrollment occurs each year during the annual benefits open enrollment period. You can initiate the discussion with your manager before then.

THE MANAGER'S ROLE

- Listen to the employee's proposal and don't assume that participation in the program means the employee is quickly winding down – they could just be ready for a change.
- Set realistic goals related to how and when knowledge will be transferred. Gather input from others on the team.
- Shifting responsibilities can be disruptive for everyone involved. Discuss in advance how you will address workload.
- While it's important to support the employee, be aware that critical business issues may require that their request is denied or postponed.
- Reference the Freedom to Work Manager Guide for help navigating the program.



Frequently Asked Questions

Enrollment

WHAT ARE THE ELIGIBILITY REQUIREMENTS?

The **Custom Schedule Program** is available to employees at any grade with manager approval. You must be age 55 or older and have 10 or more years of Abbott service in the year you are enrolling and achieve or exceed performance expectations. Eligible employees below grade 18 can participate in the Custom Schedule Program only.

The **Emeritus Program** is available to employees Grade 18 or above. You must also be age 55 or older, have 10 or more years of Abbott service in the year you are enrolling. It requires your manager and Division Vice President's approvals. You also currently need to be achieving or exceeding performance expectations. Eligible employees grade 18 and above can participate in **either or both** programs.

HOW IS THE ABBOTT SERVICE DATE DETERMINED?

For most employees, this date is equal to your hire date with Abbott. If you were an employee of an acquired company, it is typically the acquisition date. If you are a rehired employee, you may be able to combine both periods of employment. Contact the Abbott Health Benefits Center (Businessolver) to determine eligibility. Contractor service prior to your employment with Abbott does not count toward the 10 year requirement.

HOW LONG CAN I PARTICIPATE IN THE PROGRAM?

If eligible, you can stay in the program for any length of time as long as you meet program standards and have the support of your manager. Be sure to set expectations at the beginning of the arrangement for how long you intend to participate.

WHAT IF I WANT TO STOP PARTICIPATING OR RETIRE MID-PROGRAM?

You may withdraw from the program at any time. You will not, however, be able to stop the Freedom to Work pre-tax deductions from your paycheck until the end of the year. You will be paid out (as taxable income) for any unused time off that has been deducted from your paycheck.

You can retire at any time during the year. If you have used time under the program, but have not deferred the equivalent pay, we will deduct this time from any remaining vacation you may be entitled to at retirement. If you have deferred pay, but have not used the amount of time deferred, you will be paid out any remaining time (as taxable income) at your retirement date.

HOW DOES FTW DIFFER FROM THE EXISTING FLEXIBLE WORK OPTIONS AT ABBOTT?

Both FTW program options require you to transfer your business knowledge to others as a condition of participation. Flexible work options do not have these requirements or the benefit preservation features. For more information on flexible work options, visit the **Flexible Work Options Toolkit** on myHR.

CAN I PARTICIPATE IN BOTH FTW AND A FLEXIBLE WORK OPTION?

Not at the same time. You can transition from a reduced schedule to FTW, but you cannot participate in both. You can either continue your current reduced schedule or participate in an FTW option.

CAN I PARTICIPATE IN VACATION BUY AND FTW?

No. You can participate in one or the other. By enrolling in one you become ineligible for the other.

Enrollment (Continued)

CAN I PARTICIPATE IN BOTH THE CUSTOM SCHEDULE AND THE EMERITUS PROGRAMS?

It depends. Eligible employees grade 18 and above can participate in **either or both** programs. Those eligible below grade 18 can only participate in the Custom Schedule option.

IF MY REQUEST IS DENIED BY MY MANAGER, IS THERE AN APPEAL PROCESS?

Yes. Our HR policies (C-222) allow you to appeal to a higher level of management or to an Employee Relations representative by contacting the Abbott HR Service Center.

Pay & Benefits

HOW DOES FTW IMPACT MY SALARY AND BENEFITS?

For the **Custom Schedule Program**, your base salary remains the same as your full-time salary and you will have a pretax FTW deduction taken from your paycheck to pay for your additional time off. This equates to a 20% deduction per pay period if you elect to work four days a week, or less if you opt for additional vacation time.

Your 401(k) contributions and match will be based on your full-time salary. And you keep the company's 3% retirement contribution to your 401(k), if eligible.

If you are eligible for the pension plan, your eligible pay under the plan continues to be your regular full-time pay and reduced bonus.

For the **Emeritus Program**, there will be no impact on your pay, grade or benefits.

HOW WILL MY BONUS OR CASH PROFIT SHARING (CPS) BE IMPACTED?

Your bonus or cash profit sharing will be based on your reduced salary. Bonuses not based on pay (e.g., sales bonuses) will be determined at the department/division level. Other benefits such as sick pay, vacation and life insurance will not be impacted — they will be the same as if you were working full time.

WHAT HAPPENS IF I DO NOT USE ALL MY PURCHASED FTW VACATION TIME?

You would be paid out (as taxable income) any remaining FTW time at the end of the year. Non-exempt employees will record their Freedom to Work time in Workday. Exempt employees will submit days used under the program in Workday.

Knowledge Transfer & Work Redesign

WHAT ARE THE MOST IMPORTANT THINGS TO KEEP IN MIND?

Consider whether you have any duplicated efforts, unnecessary meetings, or habitual activities that you can examine. Also think about the tasks that shouldn't be eliminated, but that you can perhaps hand off to other employees as part of their development goals. Discuss it with your staff, peers, and manager to get their ideas.

Take into account categories such as business history, work process knowledge, product knowledge, successful strategies, customer characteristics, market evolution, systems capabilities, database potential, external collaborators and more. Be sure to review both the **Knowledge Transfer worksheet** and the **Work Redesign worksheet** in this handbook.

WHO DO I CONTACT WITH QUESTIONS?

Begin with your manager. If you still have questions about knowledge transfer or work redesign, contact an Employee Relations representative by calling the **Abbott HR Service Center** at 877-228-4707.

Freedom to Work Enrollment Form

Submit signed form to: **abbottforms@businessolver.com** (Businessolver). Use this form to enroll in the Freedom to Work Program. You must submit a new form each year you participate in the Freedom to Work Program. If you have any questions, reach out to (844) 306 9222 and select prompt 1 (Health & Insurance) to discuss with an Abbott Health Benefits representative.

NAME (FIRST & LAST)	PHONE

JOB TITLE	DEPARTMENT NUMBER

ABBOTT UPI	MANAGER'S NAME

1 **Which Freedom to Work program(s) are you enrolling?** ☐ CUSTOM SCHEDULE PROGRAM ☐ EMERITUS (GRADE 18 & ABOVE)

2 **Custom Schedule Program (Please choose <u>one</u> option below):**

☐ Work 4 days per week *(Purchase 1 day per week of additional time off; choose <u>one</u> option below)*:

☐ MONDAY ☐ TUESDAY ☐ WEDNESDAY ☐ THURSDAY ☐ FRIDAY

☐ Take up to 5 weeks of additional vacation time *(Work 5 days per week, but purchase 1 to 5 weeks of additional time off. To be used at any point throughout the year with manager approval in combination with existing vacation time; choose <u>one</u> option below)*:

☐ 1 WEEK (5 DAYS) ☐ 2 WEEKS (10 DAYS) ☐ 3 WEEKS (15 DAYS) ☐ 4 WEEKS (20 DAYS) ☐ 5 WEEKS (25 DAYS)

The employee and manager have completed the mutually acceptable Work Redesign and Knowledge Transfer Agreements required for the program(s) described above. The employee acknowledges that s/he is choosing to enroll in this program on a voluntary basis.

EMPLOYEE SIGNATURE	DATE

MANAGER SIGNATURE	DATE

DVP SIGNATURE (EMERITUS PROGRAM ONLY)	DATE

Submission of this form cannot be considered an expressed or implied contract or an offer to contract with any employee, either for employment for any particular length of time or with regard to any policy, procedure, plan, laws or regulations.

Freedom to Work Pay Examples

These examples use general assumptions and will not match an employee's paycheck exactly

SCENARIO 1 $80,000 non-exempt; pension eligible	ANNUAL			REDUCED PAY PERIODS (WEEKLY) [1]		
	Full-Time Employee	*FTW Participant*	*Flexible Work Option Reduced Schedule [2]*	*Full-Time Employee*	*FTW Participant*	*Flexible Work Option Reduced Schedule [2]*
Schedule	100%	80%	80%	100%	80%	80%
Gross Salary	**$80,000**	**$80,000**	**$64,000**	**$1,538**	**$1,538**	**$1,231**
FTW Vacation Purchase	$0	$16,000	$0	$0	$320	$0
Pre-Tax Deductions						
Benefits *Health, dental, etc.*	$5,000	$5,000	$5,000	$96	$96	$96
SRP (10%) *Based on gross salary*	$8,000	$8,000	$6,400	$154	$154	$123
Net Pay Before Taxes	**$67,000**	**$51,000**	**$52,600**	**$1,288**	**$968**	**$1,012**
Taxes (19%)	$12,730	$9,690	$9,994	$245	$184	$192
Net Salary *Take home pay*	**$54,270**	**$41,310**	**$42,606**	**$1,043**	**$784**	**$820**
Bonus (7%) *Based on gross salary less FTW Vacation Purchase*	$5,600	$4,480	$4,480	–	–	–
Salary Used for ARP *Based on gross salary plus bonus*	$85,600	$84,480	$68,480	–	–	–
SRP Company Contributions *Based on gross salary*	$4,000	$4,000	$3,200	–	–	–

1. Annual Pay Periods (52), FTW Deduction Pay Periods (50). In a typical year, a Freedom to Work non-exempt participant will receive a full paycheck for the first and last pay periods of the year. The 20% reduction is taken over 50 pay periods.

2. Assumes a 4-day work week schedule.

These examples use general assumptions and will not match an employee's paycheck exactly

SCENARIO 2 $150,000 exempt; pension eligible	ANNUAL			REDUCED PAY PERIODS (WEEKLY) [1]		
	Full-Time Employee	*FTW Participant*	*Flexible Work Option Reduced Schedule [2]*	*Full-Time Employee*	*FTW Participant*	*Flexible Work Option Reduced Schedule [2]*
Schedule	100%	80%	80%	100%	80%	80%
Gross Salary	**$150,000**	**$150,000**	**$120,000**	**$5,769**	**$5,769**	**$4,615**
FTW Vacation Purchase	$0	$30,000	$0	$0	$1,200	$0
Pre-Tax Deductions						
Benefits *Health, dental, etc.*	$5,000	$5,000	$5,000	$192	$192	$192
SRP (10%) *Based on gross salary*	$15,000	$15,000	$12,000	$577	$577	$462
Net Pay Before Taxes						
Taxes (19%)	$24,700	$19,000	$19,570	$950	$722	$753
Net Salary *Take home pay*	**$105,300**	**$81,000**	**$83,430**	**$4,050**	**$3,078**	**$3,208**
Bonus (7%) *Based on gross salary less FTW Vacation Purchase*	$10,500	$8,400	$8,400	–	–	–
Salary Used for ARP *Based on gross salary plus bonus*	$160,500	$158,400	$128,400	–	–	–
SRP Company Contributions *Based on gross salary*	$7,500	$7,500	$6,000	–	–	–

1. Annual Pay Periods (26), FTW Deduction Pay Periods (25). In a typical year, a Freedom to Work non-exempt participant will receive a full paycheck for the first and last pay periods of the year. The 20% reduction is taken over 25 pay periods.

2. Assumes a 4-day work week schedule.

These examples use general assumptions and will not match an employee's paycheck exactly

SCENARIO 3 $80,000 non-exempt	ANNUAL			REDUCED PAY PERIODS (WEEKLY) [1]		
	Full-Time Employee	*FTW Participant*	*Flexible Work Option Reduced Schedule [2]*	*Full-Time Employee*	*FTW Participant*	*Flexible Work Option Reduced Schedule [2]*
Schedule	100%	80%	80%	100%	80%	80%
Gross Salary	**$80,000**	**$80,000**	**$64,000**	**$1,538**	**$1,538**	**$1,231**
FTW Vacation Purchase	$0	$16,000	$0	$0	$320	$0
Pre-Tax Deductions						
Benefits *Health, dental, etc.*	$5,000	$5,000	$5,000	$96	$96	$96
SRP (10%) *Based on gross salary*	$8,000	$8,000	$6,400	$154	$154	$123
Net Pay Before Taxes	**$67,000**	**$51,000**	**$52,600**	**$1,288**	**$968**	**$1,012**
Taxes (19%)	$12,730	$9,690	$9,994	$245	$184	$192
Net Salary *Take home pay*	**$54,270**	**$41,310**	**$42,606**	**$1,043**	**$784**	**$820**
Bonus (7%) *Based on gross salary less FTW Vacation Purchase*	$5,600	$4,480	$4,480	–	–	–
SRP Company Contributions *Based on gross salary*	$6,848	$6,758	$5,478	–	–	–

1. Annual Pay Periods (52), FTW Deduction Pay Periods (50). In a typical year, a Freedom to Work non-exempt participant will receive a full paycheck for the first and last pay periods of the year. The 20% reduction is taken over 50 pay periods.

2. Assumes a 4-day work week schedule.

These examples use general assumptions and will not match an employee's paycheck exactly

SCENARIO 4 $150,000 exempt	ANNUAL			REDUCED PAY PERIODS (WEEKLY) [1]		
	Full-Time Employee	*FTW Participant*	*Flexible Work Option Reduced Schedule [2]*	*Full-Time Employee*	*FTW Participant*	*Flexible Work Option Reduced Schedule [2]*
Schedule	100%	80%	80%	100%	80%	80%
Gross Salary	**$150,000**	**$150,000**	**$120,000**	**$5,769**	**$5,769**	**$4,615**
FTW Vacation Purchase	$0	$30,000	$0	$0	$1,200	$0
Pre-Tax Deductions						
Benefits *Health, dental, etc.*	$5,000	$5,000	$5,000	$192	$192	$192
SRP (10%) *Based on gross salary*	$15,000	$15,000	$12,000	$577	$577	$462
Net Pay Before Taxes	**$130,000**	**$100,000**	**$103,000**	**$5,000**	**$3,800**	**$3,961**
Taxes (19%)	$24,700	$19,000	$19,570	$950	$722	$753
Net Salary *Take home pay*	**$105,300**	**$81,000**	**$83,430**	**$4,050**	**$3,078**	**$3,208**
Bonus (7%) *Based on gross salary less FTW Vacation Purchase*	$10,500	$8,400	$8,400	–	–	–
SRP Company Contributions *Based on gross salary*	$12,840	$12,672	$10,272	–	–	–

1. Annual Pay Periods (26), FTW Deduction Pay Periods (25). In a typical year, a Freedom to Work non-exempt participant will receive a full paycheck for the first and last pay periods of the year. The 20% reduction is taken over 25 pay periods.

2. Assumes a 4-day work week schedule.

Self-Assessment: Custom Schedule Program

Are you and your job a good fit for a reduced schedule under the Freedom to Work Program? Below are some questions to ask yourself. They are based on people and positions that have made flexibility work at Abbott and in other companies.

	I am achieving or exceeding expectations in my current role.
	My job requirements can be realigned to fit within a shorter workweek.
	I can design an appropriate schedule that will serve customer needs.
	I can set realistic expectations for myself as to what can be accomplished on a reduced schedule.
	I can participate in some way in most critical meetings and training opportunities while on a reduced schedule.
	I can delegate tasks and responsibilities when appropriate without burdening others.
	I can establish priorities effectively, knowing that I have less time to get the work done on a reduced schedule.
	I recognize that workloads tend to expand and feel I can keep reasonable time boundaries.
	I do not believe I "fill my life with work."
	I can be counted on to complete work assignments and meet deadlines.
	I am flexible and adaptable.
	I am organized and manage my time effectively.
	I can provide quality service to customers while on a reduced schedule.
	My communication skills are strong enough to keep others up-to-date on my schedule and work process.
	I don't mind working through a serious process to get what I want.

Visit Abbott's **Flexible Work Options Toolkit** for more resources and to see if a flexible work option may be more appropriate.

Self-Assessment: Emeritus Program

Are you a good fit for the Emeritus Program?

	I am achieving or exceeding expectations in my current role.
	My satisfaction at work comes primarily from my contributions to the business.
	I enjoy sharing my expertise and knowledge with colleagues.
	I can take direction from people I have supervised.
	I find it challenging to take on responsibilities I have had before.
	I am able to provide leadership regardless of my organizational role.
	I find satisfaction mentoring younger staff and colleagues over a significant time period.
	I manage my time well.
	I recognize when a major change isn't working and can speak up.
	I am patient when adapting to a new situation.
	I am a good negotiator.
	I don't mind working through a serious process to get what I want.

Knowledge Transfer Proposal Worksheet

All employees requesting to participate in Freedom to Work must complete this section. Note: A new knowledge transfer plan is required each year you participate in the Freedom to Work program.

What knowledge will you transfer? Consider categories such as business history, work process knowledge, product knowledge, successful strategies, customer characteristics, market evolution, systems capabilities, database potential, external collaborators, etc.

What is the business need for this transfer? Explain the positive consequences to the business of codifying and transferring this knowledge, and the possible negative consequences of not doing so.

Knowledge Transfer Proposal Worksheet (Continued)

To whom will you transfer the knowledge and what method will you use? Be specific for each major category of knowledge transfer.

How will you measure the success of knowledge transfer? Develop both metrics and a process for measuring the various transfer processes you describe.

Work Redesign Proposal Worksheet

Employees requesting to participate in the Freedom to Work Custom Schedule Program must complete this section.

Please list your highest value functions or tasks in your current role (List items randomly, drawing on business goals and job description)

Prioritize your higher value task list (If helpful, cluster A-B-C priorities and number within)

Work Redesign Proposal Worksheet (Continued)

Brainstorm low-value and no-value tasks/activities (Consider activities such as the following: unexamined, habitual activity; unclear delegation, wasted work, duplication; unnecessary meetings, presentations, etc.; unproductive task force activity)

Identify and prioritize any remaining "mid-value" tasks

Work Redesign Proposal Worksheet (Continued)

Assign approximate time per month spent on all tasks (high, medium, low)

Draft Ideal Positional Design (including estimated task and time)

Recommend any work to be delegated to work group